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**DEVELOPING THE HUNGARIAN 2ND SOF  
GROUPS MANNING STRATEGYDEVISING AND  
IMPLEMENTING EFFECTIVE RECRUITMENT,  
SELECTION, AND RETENTION PROCESSES**

**Ferencz, Matyas**

Monterey, CA; Naval Postgraduate School

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# **NAVAL POSTGRADUATE SCHOOL**

**MONTEREY, CALIFORNIA**

## **THESIS**

**DEVELOPING THE HUNGARIAN 2ND SOF GROUP'S  
MANNING STRATEGY—DEVISING AND IMPLEMENTING  
EFFECTIVE RECRUITMENT, SELECTION, AND  
RETENTION PROCESSES**

by

Matyas Ferencz

December 2020

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STRATEGY—DEVISING AND IMPLEMENTING EFFECTIVE  
RECRUITMENT, SELECTION, AND RETENTION PROCESSES**

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Submitted in partial fulfillment of the  
requirements for the degree of

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(COMBATING TERRORISM: POLICY AND STRATEGY)**

from the

**NAVAL POSTGRADUATE SCHOOL  
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## **ABSTRACT**

This thesis sought to present the manning challenges that affect the Hungarian Special Operations Forces development, especially in the case of its main combative element—the 2nd SOF Group—using the recruitment, assessment, selection, training, and retention (RAST-R) framework. It also aspired to identify ways and means to revise and improve this framework, with the view of increasing the number of members, and then finding, training, and retaining the right SOF operator talent. To that end, this thesis conducted a comparative research of the Hungarian and six international countries' SOF-related RAST-R strategies. The analysis revealed that SOF recruits members effectively through the use of media, but decisive success is gained when active SOF members conduct face-to-face meetings. The assessment, as part of the pre-selection procedure, brings more possible recruits if it is conducted offsite, where potential talent could be found. The standards and requirements for joining and selecting are not—and cannot be—decreased to boost the number of candidates to maintain quality above quantity. The organizational culture is a key part of the employer brand that eventuates the sustainable RAST-R cycle. The thesis recommends feasible approaches to improve the 2nd SOF Group's RAST-R processes in terms of the SOF organizational culture development, the research-based targeted recruitment, and the necessity of pre-selection.



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## LIST OF ACRONYMS AND ABBREVIATIONS

CBRN	Chemical, Biological, Radiological and Nuclear
CEE	Central Eastern Europe
CQB	Close Quarters Battle
CS	Combat Support
CSS	Combat Service Support
DA	Direct Action
FOC	Full Operational Capability
HDF	Hungarian Defence Forces
HR	Human Resources
HUN MoD	Hungarian Ministry of Defense
HUN SF	Hungarian Special Forces
HUN SOF	Hungarian Special Operations Forces
IOC	Initial Operational Capability
ISAF	International Security Assistance Forces
MA	Military Assistance
NATO	North Atlantic Treaty Organization
NCO	Non-commissioned Officer
ODA	Operational Detachment Alpha
PSC	Private Security Corporation
PSYOPS	psychological Operations
RAST	Recruitment, Assessment, Selection, Training
RAST-R	Recruitment, Assessment, Selection, Training, and retention
RS	Resolute Support
R-SOCC	Regional Special Operations Component Command
RTG	<i>Rohamlövész</i> Task Group
RTU	<i>Rohamlövész</i> Task Unit
SF	Special Forces
SFAS	Special Forces Assessment and Selection
SOAS	Special Operations Assessment and Selection
SOBC	Special Operations Basic Course

SOF	Special Operations Forces
SOTG	Special Operations Task Group
SOTU	Special Operations Task Unit
SR	Special Reconnaissance
SUT	Small Unit Training
TAA	Train, Advise, Assist
TTP	Techniques, Training, and Procedures
U.S. ARSOF	United States Army Special Forces
USSOCOM	United States Special Operations Command
UW	Unconventional Warfare
V4	<i>Visegrád 4</i>
VW	Voluntary Withdrawal

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## I. INTRODUCTION

Special Operations Forces (SOF) units have been in high demand over the past decades, and nothing indicates this [situation] will change in the near future. An oft-voiced concern within the SOF community is that the standards and requirements for joining a SOF unit are being lowered in order to fill expanding force structures. Physical strength, stamina, excellent marksmanship, and unorthodox problem solving remain at the core of SOF's self-image and identity. But is it self-evident that these traits will remain essential?

—James D. Kiras, *Special Operations Journal*

### A. PROBLEM STATEMENT

Hungary's Special Operations Forces (HUN SOF)<sup>1</sup> are facing the challenge of overstretch and personnel attrition, for a variety of reasons. Effective manning strategy is a challenge not only in the present but for the future of the 2<sup>nd</sup> Special Operations Forces Group (*MH 2<sup>nd</sup> vitéz Betralan Árpád Különleges Rendeltetésű Dandár*) of the Hungarian Defence Forces (HDF). On the one hand, negative demographic trends—explained by declining birth rates—restrict SOF recruitment. On the other hand, the civilian job market—both domestic and foreign—which provides more economic opportunities, impacts recruitment and retention of highly skilled personnel. For example, the Hungarian SOF has seen a decreasing number of volunteers (especially from the “generation Z” demographic layer) due to the higher salaries paid by civilian jobs, or the prospect of an exciting opportunity in another company.<sup>2</sup>

Likewise, many of the already-trained and experienced enlisted personnel, non-commissioned officers (NCOs) and officers within the SOF have chosen to leave the SOF

---

<sup>1</sup> The HUN SOF has multiple higher echelon leadership components, including; organizations under the MoD, or directly under the Hungarian Defence Forces Command (HDFC), such as the Special Operations Inspectorate (SOI).

<sup>2</sup> Kissné András Klára, “A Magyar Honvédség hivatásos és szerződéses állományának, valamint a versenyszféra motiváltságának összehasonlító elemzése,” 2014, <https://doi.org/10.17625/NKE.2014.002>. p. 29. The author defines Gen. Z as the first global generation, born between 1995 and 2009.

to work for private security companies (PSCs)<sup>3</sup> or for domestic or foreign companies (especially those that operate in other EU countries). In sum, these factors have caused a decline in the pool of candidates willing to join the SOF, in parallel with a significant loss of trained personnel.<sup>4</sup>

Therefore, these challenges have also affected the 2<sup>nd</sup> SOF Group, created in 2017, despite the Group's significant potential to pursue its manning efforts internally. Indeed, while the integration of the 34<sup>th</sup> Special Forces Battalion and the 88<sup>th</sup> Light Infantry Battalion enabled the newly created brigade to bypass many inhibitory administrative factors<sup>5</sup> which in turn allowed the brigade to attract trained and motivated infantry soldiers to the Special Operations Task Groups (SOTG), this integration has not improved career paths in the SOF spectrum entirely; hence, acquiring candidates with years of experience and infantry skills from the former 88<sup>th</sup> Light Infantry Battalion ceased after a promising start.

The declining rate of volunteers coupled with the degree of personnel fluctuation<sup>6</sup>—while not critical for the 2<sup>nd</sup> SOF Group in terms of current operational capability and readiness—negatively effects the 2<sup>nd</sup> SOF Group's effectiveness and promises to be an escalating concern in the future. Indeed, SOF operators express<sup>7</sup> that

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<sup>3</sup> Christopher Spearin, "Special Operations Forces a Strategic Resource: Public and Private Divides," *Parameters* 36, no. 4 (December 22, 2006): 58, <https://www.questia.com/library/journal/1G1-161012380/special-operations-forces-a-strategic-resource-public>.

<sup>4</sup> Additional challenges emerge from such expensive and exhaustive professional development standards as lengthy and expensive training, which conflict with the demand for rapid readiness.

<sup>5</sup> The administrative reassignment procedures became less bureaucratic, and the cooperation, and exchange training between the two elements turned more recent.

<sup>6</sup> From the 2<sup>nd</sup> SOF Group's perspective the fluctuation in this case represents a ratio between the exiting SOF operators— and SOF enabler personnel, and the newly trained and integrated soldiers, especially SOF operators.

<sup>7</sup> Todd South, "2-Star Responds to Anonymous Email Blasting Watered-down Special Forces Training Standards," *Army Times*, November 30, 2017, <https://www.armytimes.com/news/your-army/2017/11/30/2-star-responds-to-anonymous-email-blasting-watered-down-special-forces-training-standards/>.

“the bar is being lowered ...in terms of selection standards and criteria, in order to expand or simply maintain the current size of national SOF organizations.”<sup>8</sup>

In sum, the 2<sup>nd</sup> SOF Group’s goal is not necessarily to overstaff in terms of manpower, but rather to achieve a healthy, manageable recruitment pace while maintaining a predictable rate of personnel fluctuation—in other words, to effectively balance quality versus quantity.<sup>9</sup>

In this context, this study investigates how HUN SOF could overcome these challenges to establish and maintain successful force generation in the future to fill the positions in the 2<sup>nd</sup> SOF Group, which embodies the only combative special operations forces element of the HDF.

## **B. MAJOR RESEARCH QUESTION**

This thesis aspires to answer the following research question: what kind of recruitment strategy should the 2<sup>nd</sup> SOF Group devise and implement in line with the HDF’s recruitment campaign to select, train, and retain the most capable individuals to effectively carry out the brigade’s main roles and missions?

## **C. SIGNIFICANCE OF THE RESEARCH QUESTION**

In the last five to ten years, the security situation in the Central Eastern European (CEE) region has become more precarious; great power relations have reorganized. The role and importance of military security have been re-evaluated from the Hungarian national perspective, together with the regional aspect.<sup>10</sup> As part of the CEE region, Hungary must prepare for hybrid threats, as well as an increasing trend of extremism and related terrorism that have emerged from complex sources.

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<sup>8</sup> James Kiras, Anja Dalgaard-Nielsen, and Nicolaj Juul Nielsen, “Introduction: Recruiting and Organizing to Meet Future SOF Challenges,” *Special Operations Journal* 5, no. 1 (January 2, 2019): 1–5, <https://doi.org/10.1080/23296151.2019.1581423>, 1

<sup>9</sup> “USSOCOM,” accessed October 15, 2020, <https://www.socom.mil/about/sof-truths>.

<sup>10</sup> MTI, “Katonai együttműködésre készülnek a V4-ek,” Neokohn, September 20, 2019, <https://neokohn.hu/2019/09/20/katonai-egyuttmukodesre-keszulnek-a-v4-ek/>.

Although Hungary is a member of the most important collective defense organization, NATO, and a member of the new regional cooperation as the *Visegrád 4* (V4),<sup>11</sup> Hungary must rely on its national self-sufficiency development as well. In this case, the optimal and sustainable manning of the 2<sup>nd</sup> SOF Group is highly relevant from both the coalition and national defense perspective.

In this connection, Dr. Imre Porkoláb stresses in the *Szervezeti innováció a Magyar Honvédségben: az ember-gép szimbiózisa a stratégia elméletek tükrében* (Organizational Innovation in the Hungarian Defence Forces: Symbiosis of the human and machine in the light of strategic theories) that the HDF is currently under the institutional adaptation phase of a new strategic paradigm shift. He notes that the key to success is to be able to manage the accompanying organizational culture change in accordance with the enormous digital transformation: “The stakes are huge! Organizations that are able to successfully overcome this hurdle will make a generational leap, and those that fail will be forced to fight adversaries with the attitudes and methods of bygone eras.”<sup>12</sup> Dr. Porkoláb emphasizes that accelerating individual and organizational learning and adaptation processes is essential. He concludes that if the HDF is not able to keep the pace with technological development, and adapt our organizations, then, “technology will triumph over us.”<sup>13</sup>

In this context, this thesis is especially relevant to the Hungarian Defence Forces and to the 2<sup>nd</sup> SOF Group, as well as any governments of allied countries that undergo similar manning challenges and reform attempts.

This thesis could provide decision-makers at all levels with an overview of the challenges, and a roadmap to assist them in reworking their recruitment, SOF selection, training, and retention strategy. An effective strategy—based on lessons learned and wise foresight preparation—could provide an agenda to support governments, military decision-

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<sup>11</sup> Hungary is the member of the Visegrád Group -or V4- along with Czech Republic, Poland and Slovakia. The common goal is to synchronize the economic, diplomatic efforts, along with common defense and political interests.

<sup>12</sup> Imre Porkoláb, “Szervezeti Innováció a Magyar Honvédségben: Az Ember-Gép Szimbiózisa a Stratégiaelméletek Tükrében,” *Haditechnika* 53, no. 1 (2019): 2–8, <https://doi.org/10.23713/HT.53.1.01>.

<sup>13</sup> *Ibid.*, 6.

makers, and civil societies in their endeavors to assist SOF manning strategies. A revised SOF recruiting, assessment, selection, and training strategy could be based on an international comparative study, to present the challenges and reaffirm the fact that diminishing opportunities require an adaptive and flexible mindset.

#### **D. POTENTIAL EXPLANATIONS AND HYPOTHESES**

This thesis hypothesizes that a complex strategy is required from the HDF and the 2<sup>nd</sup> SOF Group aimed at more robust recruitment and retention mechanisms. This strategy must include the following:

- Improved recruitment and promotion processes, including research-based and targeted recruiting involving the 2<sup>nd</sup> SOF Group, in parallel with robust strategic communications and outreach processes;
- Improved pre-selection procedures organized by the 2<sup>nd</sup> SOF Group, as well as an adaptive selection and Special Operations Basic Course (SOBC) system;
- Increased salaries and benefits;
- Improved education and training activities focused on organizational culture development.

#### **E. METHOD OF THE RESEARCH**

This thesis seeks to identify possible solutions for the HUN SOF, and in particular for the 2<sup>nd</sup> SOF Group, which, as the force provider, must achieve effective force generation. To that end, this research consisted of three parts. The first part provided an overview of the role and place of the 2<sup>nd</sup> SOF Group in the HDF, and a review and analysis of the current HDF manning strategy as it relates to the 2<sup>nd</sup> SOF Group. This part aimed at providing an in-depth analysis of the current challenges and catalysts for progress in manning the 2<sup>nd</sup> SOF Group.

The second part of this research consisted of a survey in the form of a questionnaire to assess international counterparts on SOF-related recruitment, assessment, selection,

training, and retention processes. The survey sought to analyze the potential common trends and divergences in the recruitment, selection methods, and training and retention strategies of their SOF among various countries.

The questionnaire comprised the following main categories:

1. As first to locate in general the existence of challenges with manning, and retention in the targeted country, even to detect existing fall in the morale for varieties of reasons.
2. In the case of a decreasing applicant tendency and the lack of volunteers, what corrective policies and strategies are used?
3. In the case of reforming the SOF personnel assessment and selection procedures, what kind of alterations have been applied?
4. Were there any significant modifications in the SOF qualification training?
5. In the case of multiple changes, what has proven to be the most effective for efficient force generation? Revised recruiting policies, altered selection methods, or the transformed training procedures or steps to ensure more efficient retention strategy?

The third part of this thesis provided a comparative analysis between Hungary's and other countries' SOF recruitment, assessment, selection, training, and retention process development, which formed the basis for recommendations for Hungarian HDF leadership vis-à-vis improving the 2<sup>nd</sup> SOF Group manning strategies and processes.

There are a few limitations associated with this research. First, while the Hungarian Special Operations Forces capability is based significantly on the Special Operations Task Units (SOTU), this thesis discussed only the 2<sup>nd</sup> SOF Group. Second, due to classified information regarding official numbers of the active personnel, the thesis is unable to

provide exact numbers about specific elements within the 2<sup>nd</sup> SOF Group, such as the size of the Task Groups or fluctuation rates.

The third important limitation caused by the official limitations of the survey. In line with my official approval process, the survey was not allowed to ask any kind of personal, even more, subjective or predicting opinions from the participants. (Regardless, I must emphasize the outstanding support and encouragement of the Naval Postgraduate School's IRB office, which supported me in every way during the preparation of the survey.) Thus, the thesis relied only on the facts, which had greatly contributed to confirming my assumptions or stressing the effectiveness of a different perspective. However, this gap hinders my ability to acquire additional friendly and selfless, often helpful extra information.

## **F. THESIS OVERVIEW**

Chapter I provides the introduction and presents the nature of the problem that the Hungarian 2<sup>nd</sup> SOF Group has been facing in recent years because of human resource management.

Chapter II provides a review of the literature related to recruitment, assessment, selection, training, and retention (RAST-R) of personnel in Special Operations Forces.

Chapter III provides an overview of the role and place of the Hungarian 2<sup>nd</sup> SOF Group within the HDF. The chapter presents the current HDF manning strategy and processes as they relate to 2<sup>nd</sup> SOF Group. In the case of the 2<sup>nd</sup> SOF Group's involvement in the strategic recruitment campaign, this chapter also provides a comprehensive overview of opportunities—as well as strategies—and lessons learned from a successful recruitment program implemented and executed by the 2<sup>nd</sup> SOF Group.

Chapter IV discusses the international survey and its results.

Chapter V provides a comparative analysis of the 2<sup>nd</sup> SOF Group's manning strategies and practices with those employed by the surveyed countries. It also provides the overall findings of the thesis research and tests the hypotheses put forward in Chapter I. It



also provides possible recommendations to Hungarian authorities, which they can use to improve 2<sup>nd</sup> SOF Group personnel recruitment and retention.

## II. LITERATURE REVIEW

This chapter provides a review of the relevant literature related to SOF transformation. It includes academic and expert debates surrounding SOF human resource management. The literature review consists of two sections. The first section provides an analysis of the main academic debates regarding SOF transformation—including both global and Hungarian perspectives. The second section covers the main debates in the literature on what constitutes effective manning procedures. This section also includes an analysis of the scholarly works dedicated to conceptualizing the profile of the SOF operator.

### A. ON CHALLENGES AND OPPORTUNITIES TO MAINTAIN THE STRATEGIC ROLE OF SOF

There is general agreement on the necessity of improving SOF development internationally. James D. Kiras contributes to the discussion in *Special Operations Journal* in his article “Recruiting and Organizing to Meet Future SOF challenges.”<sup>14</sup> The focus of Kiras’s article is a study of personnel attrition due to high demand and high operational tempo. Kiras stresses that “the prospect of more lucrative compensation packages has lured scarce talent away from military SOF units and towards the corporate world and private sector security companies.”<sup>15</sup> The concerns of overstressing and disproportionately large attrition has brought journalists, authors, and policymakers together to investigate this phenomenon. Kiras identifies and highlights the primary concern of SOF operators, namely that “the bar is being lowered, in terms of selection standards and criteria, to expand or simply maintain the current size of national SOF organizations.”<sup>16</sup> This point of view exists in the 2<sup>nd</sup> SOF Group also, and it carries the side effect of permeating the HDF in general and potentially diminishing its reputation and image as an organization.

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<sup>14</sup> James Kiras, Introduction: “Recruiting and Organizing to Meet Future SOF Challenges” (*Special Operations Journal*, 5; 1–5, 2019), 2.

<sup>15</sup> James Kiras, Anja Dalgaard-Nielsen, and Nicolaj Juul Nielsen, “Introduction: Recruiting and Organizing to Meet Future SOF Challenges,” *Special Operations Journal* 5, no. 1 (January 2, 2019): 1–5, <https://doi.org/10.1080/23296151.2019.1581423>.

<sup>16</sup> *Ibid.*, 2.

Multiple authors indicate that the current and existing “tasks, force structure, and personnel profile”<sup>17</sup> might not be self-evident today. The *Recruiting and Organizing to Meet Future SOF Challenges* emphasizes that the complex sphere of specialties and skills has to be assessed to find the required “kind” of human talent. The required high level of adaptability to technological developments even threatens the core truth that “Humans are more important than hardware.”<sup>18</sup> Also, the idea of recruiting and integrating females as operators to fill the growing gaps is a debate that must be approached carefully. Kiras concludes that SOF operators need to be tailored to the mission, and says the “SOF may have to reassess long-held beliefs, traditions, and organizing principles to answer the question of what will continue to make SOF special?”<sup>19</sup>

To be able to define the profile of the required talent requires reassessing the way and degree of the inevitable change—in terms how the talent could respond for the recruiting. In the same context, LTC Manuel A. Diemer stresses the importance of targeted recruiting while also increasing of the pool of possible candidates. “Reducing recruiting goals and targeting the recruiting while increasing the pool of eligible is the formula that will produce the best results for Special Forces (SF) in the future.”<sup>20</sup> This general approach, was written in 2001, when the problems of overstretch and operational tempo were not as significant as they are today, yet Diemer’s suggestions were prescient. Diemer addresses “the theory of the less is better,” which ensures the “smaller size of trainees ... leads directly to the higher assessor to candidate ratios.”<sup>21</sup>

The author’s main goal in this thesis is to suggest a recruiting method whereby the pool of possible candidates is increased systematically by targeting “several low-number,

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<sup>17</sup> Ibid., 2.

<sup>18</sup> “USSOCOM,” accessed October 15, 2020, <https://www.socom.mil/about/sof-truths>.

<sup>19</sup> James Kiras, Anja Dalgaard-Nielsen, and Nicolaj Juul Nielsen, “Introduction: Recruiting and Organizing to Meet Future SOF Challenges,” *Special Operations Journal* 5, no. 1 (January 2, 2019): 1–5, <https://doi.org/10.1080/23296151.2019.1581423>, 5.

<sup>20</sup> LTC Manuel A. Diemer, USAWC Strategy Research Project: „Manning Special Forces in the 21 Century: Strategies for Recruiting, Assessing, and Selecting Soldiers for Special Forces Training” (U.S. Army War Collage 2001), 2.

<sup>21</sup> Ibid., 11.

high-yield, and high-payoff” areas instead of targeting the masses.<sup>22</sup> The U.S. Army Research Institute identified “29 attributes”<sup>23</sup> in 1999, such as physical, cognitive, interpersonal, and communication skills, to define not only the SF performance categories, but the critical performance attributes<sup>24</sup> These profile attributes are crucial to the follow-on research with the planned survey questionnaire in this thesis.

Several scholars agree with the necessity of the modern and adaptive marketing-driven PR approach. Ronald D. Ficker, Jr, Samuel E. Buttery and Jonathan K. Alt express practical applications on how the U.S. Armed Services, Australian Defence Force, and the Royal Navy exploit the recruiting practices by borrowing from the civilian marketing experiences. The future “Navy Recruiting Strategy is to improve and best align Navy Recruiting practices for the Millennial and post-Millennial generations.”<sup>25</sup> Although the targeted population is specific to the naval forces, the method of attracting younger generations requires an adaptive PR campaign.

In her doctoral thesis, Judit Stummer provides a detailed illustration of the current labor shortage and recommendations regarding overcoming this challenge. One pillar of her thesis is a survey of more than 3,000 students, who were involved in military education, in Hungary.<sup>26</sup> From her nine-year-long survey, she concludes that, in many cases, the “total lack of project-based approach for assignments among many lay in the background, even though anomalies generated by the hierarchic structure could be remedied or even terminated by the application of the said project-based approach for assignments in many cases.”<sup>27</sup> She argues that there is a need for a logically consistent project organization.

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<sup>22</sup> Ibid., 11.

<sup>23</sup>“*Special Warfare* - 06.01.1999,” DVIDS, accessed October 24, 2020, <https://www.dvidshub.net/publication/issues/8278>.

<sup>24</sup> *Special Warfare*: The Professional Bulletin of the John F. Kennedy Special Warfare Center and School, 1998.

<sup>25</sup> Ronald D Fricker, Samuel E Buttrey, and Jonathan K Alt, “Future Navy Recruiting Strategies,” n.d., 242.

<sup>26</sup> Judit Stummer, “A Magyar Honvédség személyi állománya utánpótlás biztosításának lehetőségei a köz- és felsőoktatásban tanulók körében,” n.d., 180.

<sup>27</sup> Judit Stummer, “A Magyar Honvédség Személyi állománya utánpótlás biztosításának lehetőségei a köz- és felsőoktatásban tanulók körében” (PhD Diss, Gödöllő, 2019), 132.

Stummer indicates, that it is vital to create conditions to manage the (in most cases separately existing) tasks in a coherent way. Establishing an innovative “project portfolio” team to eliminate the inherent risks of hasty decisions, supported by a consistent marketing and PR concept, could be a key task. Stummer proved in her study that a single website cannot achieve the attention of the possible demographic layer of the population; moreover, it lacks the advantage of the speed and independency of spreading social media platforms provide.

In the same vein, Petar Georgiev Vlahov introduces the targeted recruiting process as a “pre-selection”<sup>28</sup> step in recruitment—i.e., screening the volunteer’s profile using social media. In his view, a revised “pre-selection” should carefully screen and assess all the physical and mental and mature readiness, to improve selection by reducing the number of candidates with only slight chances.<sup>29</sup> Dr. Imre Porkoláb, in the *Szervezeti innováció a Magyar Honvédségben: az ember-gép szimbiózisa a stertégia elméletek tükrében* (Organizational Innovation in the Hungarian Defence Forces: Symbiosis of the human and machine in the Light of Strategic Theories), agrees, arguing that it is essential for HDF to successfully manage the challenge of organizational change resulting from digital transformation.<sup>30</sup> Dr. Porkoláb indicates that the role of attitudinal change is gaining importance these days, and it can be observed that the “large bureaucratic organizations, almost without exception, strive to use faster decision-making processes, more adaptive and flexible organizational forms, and more efficient methods of capacity building.”<sup>31</sup>

Other scholars agree. In the *A hivatástudat és technológiai fejlődés a Magyar Honvédségben* (Calling to professionalism and Technological Development in the

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<sup>28</sup> Petar Georgiev Vlahov, “Assessment and Selection Process for the Bulgarian Special Forces,” MSc Thesis, Defense Analysis Department, Naval Postgraduate School (Monterey, California: Naval Postgraduate School, 2019. n.d., 126.

<sup>29</sup> Ibid., 63.

<sup>30</sup> Porkoláb Imre, “Szervezeti innováció a Magyar Honvédségben: az ember-gép szimbiózisa a stratégiaelméletek tükrében,” *Haditechnika* 53, no. 1 (2019): 2–8, <https://doi.org/10.23713/HT.53.1.01>, 2.

<sup>31</sup> Ibid., 2.

Hungarian Armed Forces),<sup>32</sup> Tibor Benkő examines the relationship between the human resources and attitude of call for professionalism. He agrees with the view that today's accelerated world order modifies or alters traditional human values in many ways. With regard to the HDF, he contrasts soldiers in the profession and contract service soldiers, and derives motivational differences from both aspects. Benkő emphasizes the need for ongoing development of organizational culture, working conditions, and the relationships between leaders and subordinates. Benkő raises the importance of the civil-military relationship, especially since the abolition of the conscript service. Society now has only meager insight into the HDF. As a result, "society largely shapes its opinion through the media."<sup>33</sup> The hazards of this as an effect—such as harmful disinformation—as well as its benefits as promotion are repeatedly substantiated by the author.

Lt. Col. Attila Ambrus in the *A Generációs Kihívások Kezelése a Magyar Honvédségben* (Managing Generational Challenges in the Hungarian Defence Forces) outlines the factors which currently affect the HDF in terms of different generational needs and profiles. He highlights the current unfavorable demographic situation and the considerable reasons for the exit rate within the HDF. As of 2020, the composition of the HDF can be thought of as four generations: "baby boomers, X, Y and Z."<sup>34</sup> Within these groups, generations "X" and "Y" are the most common demographic layers regarding active service simply due to the current service and pension possibilities. However, the "Z" generation is of particular importance, since it represents the majority of enlisted soldiers. Based on a report reflecting the composition of the HDF in 2016, the enlisted category represented 31% of the entire HDF, significantly composed by the "Z" generation.<sup>35</sup>

Figure 1 presents the current age composition of the HDF, highlighting generations "X," "Y" and "Z." Ambrus argues that the different generational groups have different

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<sup>32</sup> Benkő Tibor, "Hivatástudat és Technológiai Fejlődés a Magyar Honvédségben" Professionalism and Technological Development in the Hungarian Armed Forces (*Hadtudomány/Különszám*, 2016), 10.

<sup>33</sup> Benkő Tibor, "Hivatástudat és Technológiai Fejlődés a Magyar Honvédségben" Professionalism and Technological Development in the Hungarian Armed Forces (*Hadtudomány/Különszám*, 2016), 10.

<sup>34</sup> Ambrus Péter, "Generációs kihívások kezelése a Magyar Honvédségben," *Honvédségi Szemle* 148, no. 4 (July 24, 2020): 108–20, <https://doi.org/10.35926/HSZ.2020.4.8>, 109.

<sup>35</sup> A Honvédség katona állománya, "Adatok a Magyar Honvédségről," n.d., 2.

workplace expectations and habits. He emphasizes that determining the motivation of a given generation is a key factor to achieving feasible long-term recruitment and retention strategies. Ambrus indicates that the solution requires “outside of the box” thinking to avoid biased generation theory schemes and to build an effective employer brand for the HDF. Ambrus states that the HDF must accept the fact that value and motivation to the “X” generation can have a completely different meaning to the “Y” or the “Z” generation.

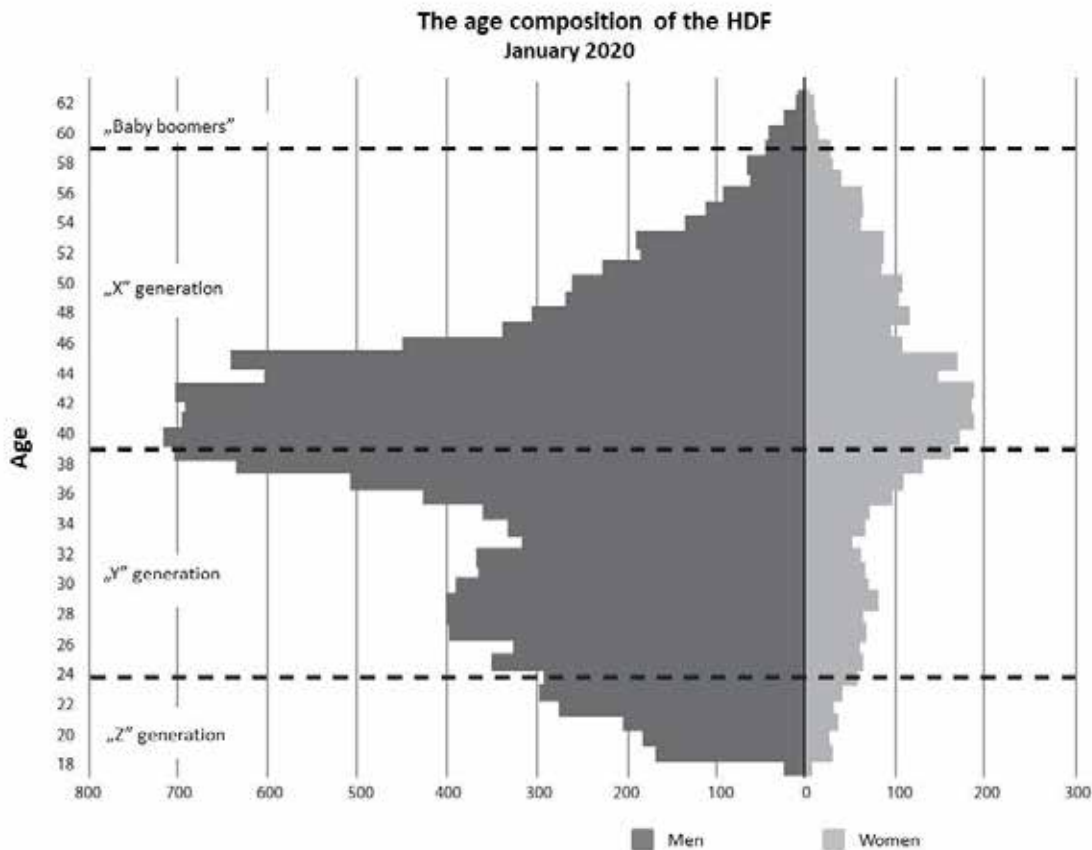


Figure 1. The age composition of the HDF, based on the assessment on 15. January 2020.<sup>36</sup>

<sup>36</sup> Ambrus Péter, “Generációs kihívások kezelése a Magyar Honvédségben,” *Honvédségi Szemle* 148, no. 4 (July 24, 2020): 108–20, <https://doi.org/10.35926/HSZ.2020.4.8>, 110.

Ambrus suggests that winning the younger generations' attention by maintaining an alluring organizational culture can be the key to developing an effective recruitment strategy and manning policy. The employer brand forms an essential part of the organizational culture, but "building and maintaining an employer-brand in the HDF should be treated as a much more complex process."<sup>37</sup> Pákozdi and Torba agree that the organizational culture, social responsibility, daily routine of the employees and the work atmosphere must reflect professionalism in a complex whole. Although organizational culture is an amorphous concept, Peter Drucker highlights its undeniable importance with a remarkable metaphor: "Culture eats strategy for breakfast."<sup>38</sup> The study from the Deloitte Center for Government—SOF culture is the mission, culture is the key to special operations transition to great power competition—concludes that organizational culture consists of varieties of tangible and intangible elements, from the simple daily routine moments such as conversations, grooming standards, and behavior during training events, up to the physical artifacts such as workspace conditions. "Organizational culture is created and maintained by the constant interaction between those tangible artifacts, the group's behaviors, and the behaviors and beliefs of each individual."<sup>39</sup> The Deloitte report indicates that the organizational culture is the vital element to any successful transformation; "when the mission shift, culture also often must shift."<sup>40</sup>

Benkő agrees with the changing environment and highlights its importance in *Hivatástudat és Technológiai Fejlődés a Magyar Honvédségben* (Calling to professionalism and Technological Development in the Hungarian Armed Forces). He states that the leadership of the Hungarian Defence Forces must adapt to the requirements of the age, including the current labor market conditions. He agrees that "the salary, promotion, and social welfare system must be developed and maintained that can be

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<sup>37</sup> Pákozdi Márta and Torba Attila, "A Magyar Honvédség személyi állományának motivációhierarchiája," *Honvédségi Szemle* 148, no. 2 (March 12, 2020), <https://doi.org/10.35926/HSZ.2020.2.5>.

<sup>38</sup> "Leveraging Ethics in Military Leadership | Deloitte Insights," accessed October 27, 2020, <https://www2.deloitte.com/us/en/insights/industry/public-sector/ethics-in-military-leadership.html>.

<sup>39</sup> Ibid.

<sup>40</sup> Ibid.



managed flexibly and be able to adapt to rapid changes in society.”<sup>41</sup> These needs are influenced by generational differences associated with cultural and different life stages, as well as differences in social background and values. The difference appears not in their existence, but in their order of precedence. The cornerstone of motivational research, Maslow’s hierarchy of needs pyramid, is suitable for measuring the motivations of military employees in the HDF.

A significant study summarizes the changes in the motivational hierarchy and the causes behind these changes. LtCol. Márta Pákozdi and LtCol Attila Torba investigate the cause behind the restructured hierarchy and the five-tier system of the Maslow Pyramid. The authors argue the *A Magyar Honvédség Személyi Állományának Motivációhierarchiája* (Motivation Hierarchy of the Personnel of the Hungarian Defence Forces) that the HDF’s aim must be to establish an organizational culture that motivates the individual for productive and satisfying work; as such, the organization gains profit through efficient and satisfying labor. Both authors suggest that the Maslow’s personal motivational pyramid “needs to be reinterpreted.”<sup>42</sup> In both authors’ interpretation, a new tier appears at the bottom of the revised Maslow pyramid: the information environment, which includes the internet (see Figure 2). Pákozdi and Torba further point out that the environment where the potential new recruits live has changed, so the system and hierarchy of needs must change as well. One peculiarity of change is that the individual may progress more quickly towards self-actualization, often ignoring or misjudging the importance of basic needs. In terms of self-actualization, virtual means of self-expression (blogs, Twitter) appear with the twist that an individual becomes satisfied when he or she can “convey his or her satisfaction to a virtual audience.”<sup>43</sup> The fact that today’s community need is

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<sup>41</sup> Pákozdi Márta and Torba Attila, “A Magyar Honvédség személyi állományának motivációhierarchiája,” *Honvédségi Szemle* 148, no. 2 (March 12, 2020), <https://doi.org/10.35926/HSZ.2020.2.5>, 7.

<sup>42</sup> Pákozdi Márta and Torba Attila, “A Magyar Honvédség személyi állományának motivációhierarchiája,” *Honvédségi Szemle* 148, no. 2 (March 12, 2020), <https://doi.org/10.35926/HSZ.2020.2.5>, 38.

<sup>43</sup> Jared Bilski, “Maslow’s Hierarchy of Needs Revised for Modern Civilization,” McSweeney’s Internet Tendency, accessed October 24, 2020, <https://www.mcsweeney.net/articles/maslows-hierarchy-of-needs-revised-for-modern-civilization>.

suppressed by the individual need for self-actualization complicates the idea of collective cause, and therefore the HDF's recruitment issues. In the interpretation of Pákozdi and Torba, the Maslow pyramid model presents still a substantive tier of the hierarchies of demand, even in the fourth industrial revolution. "Its reinterpretation does not change its essence, but the addition is recommended due to the rapidly evolving information environment."<sup>44</sup>



Figure 2. Reinterpretation of the hierarchy of needs. Source: Pákozdi and Torba (2020).<sup>45</sup>

In sum, Pákozdi and Torba indicate that in their interpretation, the Internet, as a need for the flow of information, can provide security for individuals through the resources it offers, such as communication, orientation, and the awareness that the person is a part of something larger than himself.

<sup>44</sup> Pákozdi Márta and Torba Attila, "A Magyar Honvédség személyi állományának motivációhierarchiája," *Honvédségi Szemle* 148, no. 2 (March 12, 2020), <https://doi.org/10.35926/HSZ.2020.2.5>, 42.

<sup>45</sup> Ibid., 42.

## B. ON THE CHARACTERISTICS OF THE SOF OPERATOR

The modern literature pertaining to the characteristics of the ideal SOF operator is limited. Multiple authors highlight that physical capability is given more weight than mental hardiness and interpersonal abilities. Benjamin Ordiway points out the obvious need for moral foundations in SOF operators. He argues that selection generally focuses on physical and cognitive values. “What goes unmeasured, at least formally, is an aspirant’s moral and adult development.”<sup>46</sup> He refers to ethical values, which reinforce that organizational bond and discipline are key factors for a successful educational process in the SOF.

Michael Mourouzis in his thesis investigating the way of successful assessment, suggests that four factors are essential in a candidate’s becoming an SOF operator. His research narrows down the spectrum of SOF to the field of unconventional warfare (UW), which is one core task for SOF, and a capability Hungary has been developing since 2005. Mourouzis identifies “motivation, interpersonal intelligence, cross-cultural capability, and adaptability.”<sup>47</sup> He also indicates “that the primary predictor of success is the APFT<sup>48</sup> score.”<sup>49</sup> The author draws his analysis from his own experiences as an SF recruiter for 18 months. He uses many examples to describe the situation where in which the number of soldiers shrinks, and offers multiple explanatory factors in terms of attributes common to younger recruits. He emphasizes the importance of reorganizing and building up a “referral program, accurate advertising, long- term engagement strategy, and renewed leader involvement, targeted recruitment”<sup>50</sup> to achieve a better link to society and thus to the

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<sup>46</sup> Candace L. Upton, “Virtue Ethics and Moral Psychology: The Situationism Debate,” *The Journal of Ethics* 13, no. 2–3 (September 2009): 103–15, <https://doi.org/10.1007/s10892-009-9054-2>. (Small Wars Journal, 02.07.2020). <https://smallwarsjournal.com/jrnl/art/fixing-problem-integrating-virtue-ethics-us-special-operations-forces-selection-education>

<sup>47</sup> Michael G. Mourouzis, “Finding Lawrence: Recruiting Talent for Unconventional Warfare,” MSc Thesis, Defense Analysis Department, Naval Postgraduate School (Monterey, California: Naval Postgraduate School, 2011), v.

<sup>48</sup> (APFT) Army Physical Fitness Test.

<sup>49</sup>: Michael G. Mourouzis, “Finding Lawrence: Recruiting Talent for Unconventional Warfare,” MSc Thesis, Defense Analysis Department, Naval Postgraduate School (Monterey, California: Naval Postgraduate School, 2011), 66.

<sup>50</sup> Ibid., 66.

potential pool of candidates. He also argues that nowadays, in order to keep pace with the rapidly evolving modern world, a revised method of communication is essential. Traditional methods, such as face-to-face conversation, contacting, and limited travel options for recruiters leave many opportunities untapped.

Interestingly, George F. McGrath describes a methodology similar to the one being used by the HDF. The four main prospecting strategies to recruit USSF volunteers are the flexible mixture of “telephone, referral, face-to-face, and internet or email prospecting.”<sup>51</sup> In his view, e-mail prospecting is the least useful tool, while face-to-face meetings<sup>52</sup> are key in gaining and keeping the attention of potential volunteers. The importance of human persuasion cannot be neglected, and should be used with other tools in the modern complex recruiting environment, as McGrath presented. At the same time, the human factor must be integrated strategically into the system of recruitment tools. McGrath ranked the above-mentioned strategies in 2007. Over the last 13 years, the available options for communication and the trends of using different technologies to communicate have increased in an explosive way. Beth J. Ash argues that social media plays a key role in this system.

In sum, human interaction is still a powerful factor in convincing people and in recruiting, but it must be integrated into the toolbox of advertising and communicating. The internet, websites, social media, printed publications, and even small-scale distributed product-based strategy exist within the context of human interaction.

## **C. CONCLUSION**

The relevance of the SOF remains unquestioned, a fact that is emphasized in the literature review. The SOF represents a strategic capability in the decision makers’ toolset, to achieve high payoff goals, in a modern environment where conventional forces cannot operate or can operate only to a limited extent. In the 21<sup>st</sup> century, security challenges have

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<sup>51</sup> George F. McGrath, “Email Marketing for U.S. Army and Special Operations Forces (SOF) Recruiting,” MSc Thesis, Defense Analysis Department, Naval Postgraduate School (Monterey, California: Naval Postgraduate School, 2007), 5.

<sup>52</sup> Ibid., 52.

become more and more complex; developments such as the grey zone, hybrid warfare, and increasing terrorism reaffirm the need for ongoing SOF development. In the modern environment, the skills of adaptivity and flexibility are crucial; they must come from the military organization, but also from the individual. Therefore, in most sources the importance of the human factor, the SOF operators, is highlighted.

These academic debates reveal the significance of the human factor even in a time of accelerated digitization. An analysis of the Hungarian literature makes it clear that a transformation of the system of social needs is emerging. This transformation in the hierarchy of social needs affects the HDF, and thereby the 2<sup>nd</sup> SOF Group's manning possibilities. The existing literature reveals that the current-day employee—and any potential workforce—relates differently to the employer and to the workplace. Due to this altered relationship, the HDF must consciously and proactively think of itself as an employer with a brand. The literature indicates the importance of organizational culture, and suggests that the HDF must adapt to compete with Human Resources departments in parallel with the ongoing defense industry development.

The literature suggests that the challenge for the HDF is twofold. The military capability has to evolve with changing threats, while, at the same time, the HDF must find and recruit suitable personnel into its organizations. This is an even more complex challenge in terms of the nature of SOF. The capabilities and commitment required of a SOF operator are far more complex, and the expectations far higher, than they are for conventional forces. While the sources indicated approaches the 2<sup>nd</sup> SOF Group can take to expand its role by assisting with effective recruitment, it also reaffirms that the 2<sup>nd</sup> SOF Group must adapt to the environment if the number of volunteers is decreasing, in order to keep its high organizational standards and requirements when selecting and training future SOF operators.

### **III. BACKGROUND OF THE HUNGARIAN 2<sup>ND</sup> SOF GROUP: ORGANIZATION AND MANNING**

Since the mid-2000s, to effectively combat the multifarious challenges of the current regional and global security context, the Hungarian political and military leadership has striven to develop special operational capabilities within HDF.<sup>53</sup> The 2<sup>nd</sup> SOF Group, established in 2017, is the component largest in size, and most valuable in terms of fighting capability, in the overall Hungarian SOF. This chapter provides an overview of the role and place of the Hungarian 2<sup>nd</sup> SOF Group and SOF operators—the essential components of the overall SOF mission—in the HDF. It also provides a review and analysis of the 2<sup>nd</sup> SOF Group’s personnel selection process.

#### **A. AN OVERVIEW OF THE 2<sup>ND</sup> SOF GROUP**

Recent regional and global security trends and hybrid warfare developments have increasingly been calling for high-readiness, state-of-the-art military forces equipped with modern armaments, capable of operating under unified command and control, yet also able to carry out tasks to a limited extent with conventional military elements. To that end, at the direction of the Hungarian government, the HDF created the 2<sup>nd</sup> Special Operations Regiment on 01 September 2017.<sup>54</sup> In terms of capability; SOF are military units, able to operate effectively in small units, in extreme climatic environments, under high physical and psychological pressure, with the tradecraft of conventional and unconventional problem-solving to achieve high-payoff objectives.

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<sup>53</sup> Special operations involve “Military activities conducted by specially designated, organized, selected, trained, and equipped forces using unconventional techniques and modes of employment.” Madeleine Moon, “*NATO Special Operations Forces in the Modern Security Environment*,” 169 DSCFC 18 E rev.1 fin | Original: English | 18 November 2018, (Defence and Security Council (DSC) Sub-Committee on Future Security and Defence Capability (DSCFC), 2018.), 4.

<sup>54</sup> The brigade became FOC on 28 February 2018. 37/2017, (VII.24) HDF Commission, *A Magyar Honvédség különleges rendeltetésű dandár képesség kialakításával kapcsolatos egyes feladatokról*, Particular tasks of the capability establishment of the HDF 2nd Special Operations Group (*Netjogtár*) [https://net.jogtar.hu/getpdf?docid=A17U0037.HM&targetdate=ffffff4&printTitle=37/2017.+%28VII.+24.%29+HM+utas%C3%ADt%C3%A1s&referer=http%3A//net.jogtar.hu/jr/gen/hjegy\\_doc.cgi%3Fdocid%3D00000001.TXT](https://net.jogtar.hu/getpdf?docid=A17U0037.HM&targetdate=ffffff4&printTitle=37/2017.+%28VII.+24.%29+HM+utas%C3%ADt%C3%A1s&referer=http%3A//net.jogtar.hu/jr/gen/hjegy_doc.cgi%3Fdocid%3D00000001.TXT).

The structure of the 2<sup>nd</sup> SOF Group is similar to the structure of any other Hungarian military brigade organization—commanding element, combat elements, combat support elements, combat service support elements—with one exception. The components of the brigade (including all of the combat elements) are not organized into battalions but into Task Groups (TGs): two Special Operations Task Groups (SOTG) and two *Rohamlövész* Task Groups (RTG).<sup>55</sup> This unique TG structure allowed the brigade to maintain the same staff capabilities that a conventional battalion does although smaller in size.<sup>56</sup> Similarly to U.S. Ranger battalions, the RTGs are airborne, or air-mobile capable, fast-deployable combat elements, built for direct action and special reconnaissance. The RTG’s combat elements are divided into platoon formations—*Rohamlövész* Task Units (RTU)—to achieve flexible maneuver and firepower capacity. In contrast, the SOTGs, regarding the main combat elements, are composed of the Special Operations Task Units (SOTU), which is the “lowest level of a SOF tactical level combat element that deploys by air, land, or sea and is able to conduct SR, DA, or MA.”<sup>57</sup>

The SOTUs are twelve-man operator teams, highly similar to the U.S. Operational Detachment Alpha (U.S. ODA). In addition to direct action and special reconnaissance operations, SOTGs and the subordinate SOTUs are fully trained to plan, lead, and execute military assistance (MA) and non-conventional operations. The Hungarian SOF capability is highly reliant on the Special Operations Task Units (SOTU) of the 2<sup>nd</sup> SOF Group.<sup>58</sup> From the CS and CSS aspect, the 2<sup>nd</sup> SOF Group is structured to maintain the previously highlighted flexibility and mobility. Besides the brigade’s commanding element, one

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<sup>55</sup> The RTGs are officially named as *Rohamlövész* Task Groups. The name can be derived back to the *Rohamlövész* course, - the Special Combat Infantry Course- which was the most challenging ranger type, light infantry and air assault course in the HDF between 2003 and 2013.

<sup>56</sup> Thus, the TG leadership manages a smaller size force—e.g., four quickly deployable, self-sufficient combat TGs.

<sup>57</sup> Tajti Norbert, “Enhancing Hungarian Special Forces Through Transformation—The Shift to Special Operations Forces” MSc Thesis, Defense Analysis Department, Naval Postgraduate School (Monterey, California: Naval Postgraduate School, 2010), 2

<sup>58</sup> As a matter of course, the SOTGs do not embody the full range of special operations capability. During the preparation of the mission, either the execution, external enablers from the HDF can be attached and utilized as force multiplier capabilities. For instance; Civil-Military, and Psychological Operations Teams, (CIMIC-PSYOPS) Explosive Ordnance Disposal (EOD) teams, and Chemical Biological Radiological Nuclear (CBRN) teams from the HDF.

Combat Support Task Group (CSTG), one Logistical Company (Log Coy), and the Training Company (Training Coy) are responsible to support the SOTGs or RTGs missions.<sup>59</sup> This innovative structure has several benefits; all task group-sized elements are structured to operate a staff, likely to size and function as conventional battalions do.<sup>60</sup> This structure in turn allows the subordinate fighting elements in the TGs to operate with the support of their organic commanding, CS, and CSS elements, to maintain efficient self-sufficiency.<sup>61</sup>

The 2<sup>nd</sup> SOF Group's unique organizational design allows it to perform a full spectrum of special operations tasks, using land, air, and waterborne insertion methods as well as light infantry—ranger type—tasks, combining them as needed. Mission execution is characterized by a high degree of self-determination and precision. The 2<sup>nd</sup> SOF Group's main responsibilities, which derive from the memorandum of founding, signed by the Minister of Defense, include the following tasks:

The protection of Hungary's sovereignty, territorial integrity, and borders, by military force, executing joint defense and peacekeeping tasks arising from international treaties, and the activities of humanitarian action in accordance with the rules of international law. Execution of special operation tasks and related activities are defined in NATO doctrines under national authority, or rather participation in them within the alliance; participation in tasks undertaken in peace operations; participation in peacetime and war in search and rescue operations. Participation in crisis management is defined in separate plans.<sup>62</sup>

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<sup>59</sup> The Training Coy, for example, is designated to plan, organize, and execute training events, such as the Special Operations Assessment and Selection (SOAS) and the ensuing Special Operations Basic Course (SOBC). Due to its high level of workload, the SOAS are often dedicated tasks for the SOTGs.

<sup>60</sup> In terms of the functions, the staff covers the roles from S1 to S7, organized into operational center, support center and signal center.

<sup>61</sup> In case of the SOTGs, organically Joint Terminal Attack Controller Team, Sinper Team, and Intel Support Team and an Infantry Platoon can be found as CS elements. From the CSS aspect, all SOTGs includes a Logistics Platoon, and Signal Squad.

<sup>62</sup> "MH 2. vitéz Bertalan Árpád Különleges Rendeltetésű Dandár," July 31, 2020, <https://honvedelem.hu/alakulat/mh-2-vitez-bertalan-arpad-kulonleges-rendeltetesu-dandar.html>.



More specifically, the 2<sup>nd</sup> SOF Group's main roles include the following: conducting special operational activities—including special reconnaissance (SR), direct action (DA), and military assistance (MA)—as directed by Hungarian or/and NATO authorities; participating in peacekeeping operations; carrying out military operations aimed at safeguarding Hungary's homeland security, in line with NATO treaties; conducting joint military operations with the rest of the Hungarian Defence Force's branches (land or air force, for example) to respond to unexpected security threats requiring military force; carrying out additional special missions that either are too difficult, or cannot be, combated by conventional forces; conducting combat search and rescue operations; and participating, upon request, in military police tasks.<sup>63</sup>

These roles and responsibilities are in line with the NATO Special Operations Forces, as defined by NATO's Allied Joint Doctrine for Special Operations, such as the Direct Action (DA), Special Reconnaissance (SR), and Military Assistance (MA). Essentially, the SOF's main role is to support NATO and national operational and strategic goals. A common feature of these tasks is the correlation of high-risk, and the high-pay-off employment concept. In this context, indicating Hungary's NATO membership-related collective defense and security responsibilities, the Hungarian Special Operations Task Units combined with commanding elements and support attachments were deployed continuously in operational theatres. The Hungarian contingents executed rotations in Central Afghanistan (2009-2012), and Eastern Afghanistan (2012-2014), under the mandate of the International Security Assistance Force (ISAF), and, since 2014 to the time of this writing, in the northern region of Afghanistan under the mandate of the Resolute Support Mission (RS-M).<sup>64</sup> In addition, SOTUs have conducted advisory and training deployments in Northern Iraq. Since 2016 Hungarian SOTUs and members of combat support (CS) and combat service support (CSS) elements have been deployed under the

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<sup>63</sup> Ibid.

<sup>64</sup> Beszámoló, az afganisztáni Nemzetközi Biztonsági Közreműködő Erők (ISAF) műveleteiben történő magyar katonai szerepvállalásról szóló 21/2008. (XII.29) Korm. Határozat módosításáról (Government of Hungary 2013. December), 2–3. <https://www.parlament.hu/irom40/00050/00050.pdf>

Kurdistan Training and Coordination Center (KTCC) to fight the Islamic State of Iraq and Syria (ISIS) within the Hungarian contingent.<sup>65</sup>

All in all, Special Operations Forces consist of selected and highly trained soldiers who are individuals with unconventional mindset.<sup>66</sup> Norbert Tajti in *Enhancing Hungarian Special Forces through Transformation—The Shift to Special Operations Forces* argues that special forces operators must achieve success when the stakes are very high, which in turn requires unconventional thinking, which is not something readily found in the military standard operations manual.<sup>67</sup> To that end, recruitment in SOF must ensure that the best and brightest enlisted, non-commissioned officers, and officers join the special operations forces. This endeavor is exactly what Hungary's SOF has striven to do since the creation of its first SF battalion in 2005, and has continued to accomplish after the establishment of the 2<sup>nd</sup> SOF Group in 2017.

## **B. THE 2<sup>ND</sup> SOF GROUP'S PERSONNEL RECRUITMENT, ASSESSMENT AND SELECTION PROCEDURE**

The 2<sup>nd</sup> SOF Group has limited authority to operate its independent self-serving civilian-focused recruitment system, so the brigade is highly dependent on the HDF's recruiting campaign, since the end of conscription in 2004.<sup>68</sup> The HDF's recruitment strategy involves both direct—in person—and virtual staffing endeavors. The recruitment specifically for the SOAS in terms of the 2<sup>nd</sup> SOF Group occurs externally and internally,

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<sup>65</sup> Wagner Péter, „Magyar részvétel az Iszlám Állam Elleni harcban: Kiképzési Feladatok Iraki Kurdisztánban” *Hungarian Participation to Fight ISIS: Training Missions in Iraqi Kurdistan* (Antal József Tudásközpont, AJRC-Elemzések, 2016), 7.

<sup>66</sup> Tajti Norbert, “Enhancing Hungarian Special Forces Through Transformation—The Shift to Special Operations Forces” MSc Thesis, Defense Analysis Department, Naval Postgraduate School (Monterey, California: Naval Postgraduate School, 2010), 23.

<sup>67</sup> Tajti gives a brilliant definition about the unconventional thinking; “...not taking anything by face value and seeking out the intention of the rules rather than blindly apply them, and occasionally even questioning authority. Thinking unconventionally means seeing around the corner where other people see walls and being innovative and adaptive as the rule and not the exception, while remaining moral or, at worst, amoral, but never immoral.” p. 22-23.

<sup>68</sup> “*Honvédségi Szemle*, 2009 Arcanum Digitális Tudománytár,” accessed October 28, 2020, [https://adtplus.arcanum.hu/hu/view/HonvedsegiSzemle\\_2009/](https://adtplus.arcanum.hu/hu/view/HonvedsegiSzemle_2009/), 34. The 2nd SOF Group often participates in official promotional activities between the brigade and other military organizations of the HDF, also in advertising activities specifically toward the civil society.

from the existing Hungarian armed forces personnel, through announcing the official requirements through the HDF's official lines of communication.<sup>69</sup> To perform comprehensive recruitment tasks, the HDF operates a military recruitment system involving a number of organizational elements, from the level of recruiting offices to the leading element in the MoD, which will be discussed next.

## **1. External Recruitment: The HDF's Recruitment System**

The HDF's and MoD's toolset provides information on the internet through web pages, which contain—mostly only the required—official information and steps to those who are interested in joining the service.<sup>70</sup> These endeavors have particularly targeted today's younger generation—potentially the layer that could be the SOF operator of the future—which is technology-savvy and “expects to access any information, anytime, anywhere, and on any device.”<sup>71</sup> As such, HDF's recruitment websites are high-quality, allowing instant access to social media, while the technical staff develops the quality of the interactive messages.

These changes have boosted HDF's recruitment capabilities. Availability on Facebook, Instagram, YouTube and other social media platforms has enabled the HDF to make information accessible to the general public quickly and cost effectively.<sup>72</sup> As followers of a platform grow, so does the likelihood that carefully crafted messages will reach the target audience. The self-generating recruiting effect of social media is also a

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<sup>69</sup> The upcoming selections are advertised on the HDF's website(s) and their linked social media, and through email to all the HDF's subordinate elements. Through the web-site the sign-up sheet, mandatory equipment list and description are available. “Kiválasztó - idén utoljára,” November 3, 2020, <https://honvedelem.hu/hirek/kivalaszto-iden-utoljara.html>.

<sup>70</sup> Before 2015, the webpages and other social media platforms were often outdated or included partially inaccurate information. As a corrective, since 2015 the HDF with the directives of the MoD implemented significant changes and developments to increase the quality and the content of the media-based public information and advertising. Judit Stummer, “a magyar honvédség személyi állománya utánpótlás biztosításának lehetőségei a köz- és felsőoktatásban tanulók körében,” n.d., 180, 56,59,61,152.

<sup>71</sup> John Sano, “The Changing Shape of HUMINT,” 2015, 4. In particular the „Y” as so called *global generation*, and the „Z” so called *digital generation*.

<sup>72</sup> “Irány a Sereg! - A Magyar Honvédség Karrieroldala,” accessed November 3, 2020, <https://www.iranyasereg.hu/>. To protect the 2<sup>nd</sup> Group's operational security, the 2<sup>nd</sup> SOF Group's virtual presence has involved content screening, including for example, the identity of the operators, or even the listing of sensitive technical equipment.

significant positive adjunct as followers continue to share content with other followers.<sup>73</sup> This cost-effective method can support the feedback loop to the HDF about the worthwhile types of media products. The HDF 25<sup>th</sup> *Klapka György Lövészdandár*'s (Klapka György Infantry Brigade) website provides a good example of official information presented in a modern, interactive way.<sup>74</sup> The directly accessible social media links enable the interested individual to easily join and follow events.<sup>75</sup> Consequently, social media stands far apart from mere web page advertising and plays an importance role in recruitment for the HDF.

Notwithstanding these developments, intensive virtual presence alone is not enough for effective recruitment; real-world, face-to-face personal contact by trained and selected professionals remains essential. The HDF's recruitment office system—by regional distribution—is intended to cover the entire country to provide physical access for prospective personnel.<sup>76</sup> These stationary offices are invaluable for individuals who are determined to join or who have specific questions regarding the service before joining. One initiative in the recruitment office system is the opening of a temporary recruitment office on the University of *Eötvös Lóránd* campus—in the capital city of Budapest. Besides providing an opportunity for civilians to initiate steps to join the military, it also seeks to address and inform university students about active and reserve service opportunities after their studies.<sup>77</sup> The focus group is based on the assumed college dropouts or students with a degree who might be looking for a different job, that can provide more excitement for certain years if signing up with a contract.

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<sup>73</sup> Zina Bacha, "Social Media Impact on The Recruitment Process Today," Strammer (blog), February 21, 2019, <https://strammer.com/en/social-media-impact/>.

<sup>74</sup> "MH 25. Klapka György Lövészdandár," accessed October 28, 2020, <https://tataidandar.hu/>.

<sup>75</sup> The previously mentioned online presence related limitations regarding the 2<sup>nd</sup> SOF Group do not prohibit website promotion, however, the brigade's web-site is out of service for a long period, due to maintenance issues, therefore the dissemination of the official information and the advertisement is less effective.

<sup>76</sup> Currently, in 19 counties with 22 Recruiting offices and one mobile recruiting office.

<sup>77</sup> "Egyetemistákat Toboroz a Honvédség, Már Be Is Lehet Lépni a Seregbe Az ELTE-n | 168 Óra," accessed October 28, 2020, <https://168ora.hu/itthon/egyetemistakat-fog-toborozni-a-honvedseg-mar-be-is-lehet-lepni-a-seregbe-az-elte-n-185661>.

Military education programs aim to extend the pool of potential future HDF recruits. The National Defense Education Program (NDEP) in particular—although not as an organic part of the recruitment strategy—is a key tool to reach the younger generation. This program aims to strengthen patriotism through education and tutoring. The goal is to do more than simply train; it is to establish a bond and build respect for their homeland, and guide them through education and example.<sup>78</sup> The aim of the NDEP, which indirectly supports military recruitment, is to increase the social recognition of the HDF and to promote subjects that develop defense and military knowledge through the official education system.<sup>79</sup> As part of the HDF's human resources development, the aim is to expand the NDEP nationwide, starting with the upper grades of elementary schools, to establish military high schools with dormitories,<sup>80</sup> and to offer elective classes for higher education students.<sup>81</sup> Positive early education contributes to a willingness to serve in the military later. The knowledge gained, as well as the continuously available interaction and community, helps an individual to feel less insecure in an accelerating information environment and in a world of globalization. The NDEP supports the long-term and indirect strategy in case of the 2<sup>nd</sup> SOF Group's manning options. Based on the targeted audience—such as high school and higher education students—the NDEP does not contribute to the short-term manning strategy, but the program reshapes the divide between the society and the HDF. The intent, that the HDF keeps its finger on the pulse of younger generations, measures the student's willingness and attitude toward military service and supports the provisions for the recruitment strategy, and as a side effect, enlarges the pool of possible volunteers. Judit Stummer proved in her empirical research in the *A Magyar Honvédség Személyi állománya utánpótlás biztosításának lehetőségei a köz- és*

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<sup>78</sup> “Értékszűrővel kell felvértezni a diákokat,” *Magyar Nemzet* (blog), accessed October 28, 2020, <https://magyarnemzet.hu/belfold/ertekszurovel-kell-felvertezni-a-diakokat-7727381/>.

<sup>79</sup> “Hazafias nevelés és honvédelem,” September 22, 2020, <https://honvedelem.hu/hirek/hazafias-neveles-es-honvedelem.html>.

<sup>80</sup> “A Honvédelmi Nevelés Pedagógiai Oldala | Pedagógiai Folyóiratok,” accessed October 28, 2020, <https://folyoiratok.oh.gov.hu/educatio/a-honvedelmi-neveles-pedagogiai-oldala>.

<sup>81</sup> Currently the Program contain an effective cooperation with 10 vocational institutions, and 68 schools in Hungary where the students can choose the subject of basic-level national defense also for the matriculation.

*felsőoktatásban tanulók körében* (Opportunities for the Provisions in the Personnel Recruitment of the Hungarian Defence Forces between the high school and higher education students) that the entry rate of new volunteers does not grow demonstrably due to NDEP only; the HDF's reputation and its acceptance by civilian society is more likely to have caused an increase.<sup>82</sup> In summary, these programs have been able to directly address mainly the “Y” and “Z” generations, promoting various options for active or reserve service along with educational opportunities, such as the NCO Academy or the University of Public Services.

Certainly, the indirect recruiting effect of the message aimed at generations Y and Z—that of raising interest, which can reach family members and a narrow circle of acquaintances—cannot be disregarded. To reach a wider sphere of generations along with the targeted youngsters, NDEP initiated the so-called *military camps*, which have proven to be a success in multiple ways.<sup>83</sup> Besides the primary intent, to promote the HDF as the military service as an option for future generations, parents come into closer contact with the soldiers and military organizations to whom their children are entrusted. Dialogue between them and insight into everyday military life helps adults to consider the service as well as to spread the message.

The NDEP is the cornerstone of a long-term manning concept, and, for this reason, the MoD and HDF decided in 2017 to launch a recruitment program aimed exclusively at adult population. The 2<sup>nd</sup> SOF Group planned, organized and executed the concept, aimed at motivating a wider range of generations to join the HDF in the form of active or reserve service. The already positive perception of special operations forces, based on the extraordinary training and missions executed by the 2<sup>nd</sup> SOF Group, was reinforced by the display of modern equipment, provided a great chance to publicly advertise the event, and enlarge the pool of recruits.

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<sup>82</sup> Judit Stummer, “A Magyar Honvédség személyi állománya utánpótlás biztosításának lehetőségei a köz- és felsőoktatásban tanulók körében,” n.d., 180. p. 104.

<sup>83</sup> Military camps are conducted in almost every garrison in the country in the summer, thus, variations such as Air Force, Engineer, Survivor, Diver, etc., camp allow for a high degree of interest and participation. One specific event will be discussed later in this chapter.

## 2. Internal Recruitment

Despite these public outreach efforts, the Special Operations Task Groups depend heavily on internal manning policies and processes. Of the two legal predecessors of the 2<sup>nd</sup> SOF Group, the 88<sup>th</sup> Light Infantry Battalion—in which the combat elements were transformed into RTGs<sup>84</sup>—can be considered as the most likely source with the potential to meet the challenge of manning internally. The organizational interaction was mutually beneficial, and the integration allowed the newly created brigade to bypass many administratively inhibitory factors.<sup>85</sup> This organizational fusion in fact enabled the newly formed brigade to target and recruit trained and motivated RTG infantry soldiers into the Special Operations Task Groups. However, this organizational integration did not entirely improve the career path for operators, and SOF enablers in the 2<sup>nd</sup> SOF Group; hence, acquiring candidates with years of experience and infantry skills from the RTGs declined rapidly after a promising start.

Under optimal conditions, followed by the success of HDF recruitment, new soldiers are assigned first to one of the 2<sup>nd</sup> SOF Group's RTGs in infantry positions or perhaps to a CS element. The newly assigned enlisted soldiers or NCOs, even 2<sup>nd</sup> lieutenants, spend just enough time to gain practice and experience in techniques and procedures of the light infantry profession.<sup>86</sup> Of these personnel, those RTG soldiers who are highly motivated and decide to specialize more deeply in SOF, apply for the SOAS and undergo an assessment and selection process—which will be discussed next.<sup>87</sup>

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<sup>84</sup> The *Rohamlövész* Task Units are dedicated to fulfill the complex role of an airborne and air-mobile, light infantry force. They are capable to execute direct action and special reconnaissance missions, but as highly prioritized; to support the SOTG's missions.

<sup>85</sup> Within the 2<sup>nd</sup> SOF Group, reassignment processes and career opportunities have become simpler and less bureaucratic.

<sup>86</sup> They participate in national and multinational exercises, trainings, and overseas deployments—for up to 2 or 3 years.

<sup>87</sup> Consequently, manning the RTGs is a high-priority demand for the 2<sup>nd</sup> SOF Group.

This selection process—which allows any soldier from the HDF to apply<sup>88</sup>—consists multiple specific tasks in a form of an exercise, aimed to target individuals most likely to possess the mental and physical abilities required to begin the SOBC. On average, only 20–30% of candidates successfully complete the selection process. Of those who fail to complete the process, 90% withdraw voluntarily, and 60% of these individuals withdraw in the first 72 hours.<sup>89</sup>

The selection’s exclusive focus is to find volunteers with the potential to fulfill the role of the SOF operators only. At this point—in contrast with the U.S. SOF for example—the 2<sup>nd</sup> SOF Group does not have distinguished selection specially for the combat support elements.<sup>90</sup> Between 2018 and 2020, for example, four selections were organized by the 2<sup>nd</sup> SOF Group, and the majority of applicants came from the 2<sup>nd</sup> SOF Group’s RTGs. Applicants from elements from outside the 2<sup>nd</sup> SOF Group’s RTGs represent the whole spectrum of the HDF, but mostly the other combat, combat support (CS), and combat service support (CSS) units.

The selection process—which emulates the U.S. Army Special Forces’ assessment and selection (SFAS) process—takes place over a period of 10 days. Each daily training session takes up to 20 hours.<sup>91</sup> At the beginning of the process, candidates must pass a T4-level physical and health test; only candidates who pass these tests can continue to the next stage of the actual selection process.<sup>92</sup> At the same time, a 2<sup>nd</sup> SOF Group psychologist

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<sup>88</sup> Prerequisite for application requires from the enlisted, soldiers, NCOs or officers in professional or contract career their commander’s affirmation, likewise the medical eligibility, and maximum 40 years of age.

<sup>89</sup> “Kiválasztó – második alkalommal,” August 2, 2020, <https://honvedelem.hu/hirek/hazai-hirek/kivalaszto-masodik-alkalommal.html>.

<sup>90</sup> Both men and women can apply for selection, but so far only men have been able to complete successfully.

<sup>91</sup> The legal and official framework is based on the Hungarian Special Operations Doctrine, General Military Accident Prevention and Health Regulations Manual, and Military Land Navigation Manual. Addition the 2<sup>nd</sup> SOF Group has its own Training Program Manual f to provide the flexibility and professional document-based consistency.

<sup>92</sup> The T4 category is the highest physical level assessment requirement in the HDF. In addition to SOF, it is typically in use as official requirement for reconnaissance forces.



supports the instructor team by assessing each candidate's intellectual abilities and motivation.<sup>93</sup> The psychological testing consists of the following four main parts: a preliminary interview, which consists of a semi-structured 25-question confidential interview with each candidate;<sup>94</sup> specific intelligence tests;<sup>95</sup> observation of applicants' conduct in group communication and physical activity; and an exploratory interview with candidates who withdrew from selection. The preliminary interview also helps to track the current adjudication of the 2<sup>nd</sup> SOF Group, the gained information from those candidates who volunteer from other branches, or rarely, from the MoI elements. These candidates' opinions about the 2<sup>nd</sup> SOF Group could help the Group to develop and refine the effective advertising method specifically tailored to attract soldiers in other branches. In addition, the motivational interviews may reveal more than just evidence of exclusionary reasons. The results can help instructors adjust and change the workload with respect to a particular individual, to test his reactions and capabilities.

The individual physical and psychological test activities last for three days. Candidates who pass move on to the second phase, the land navigation test—a test of an individual's capacity to adapt and endure under challenging conditions—which measures the candidate's stamina. The final phase is the teamwork phase, which is executed over the next three days.<sup>96</sup> The selection ends with a 35 km full-equipment march after a planned period of sleep deprivation.

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<sup>93</sup> The psychologist's official statements provide an opportunity to screen and filter out personnel, who demonstrate deviant, destructive patterns.

<sup>94</sup> These predefined questions are asked in a flexible order, to allow the psychologist to react and guide the conversation if some sensitive issues are emerging, which can highlight the deviant or instable stamina. The purpose of this interview is to assess each candidate's personality and personal skills, and to identify who is not suitable. In addition, this pre-constructed image forms the basis for the psychologists about the person, which helps to track the possible development or reflexion of the person's character and motivation during the actual measurement points and tasks.

<sup>95</sup> Siklódi mentions the OTIS II. type human intelligence test, Miller - technical intelligence test, Raven's non-verbal test procedure mobilizing a wide range of cognitive functions, and personality tests (CPI, IKE, EPQ).

<sup>96</sup> *Kiképzési Program, Különleges Műveleti katonák, alegységek és törzsek részére*, Training manual, Special Operations Forces, for units, and staff elements (Published for the 2<sup>nd</sup> SOF Group internal use 2014), 6–7.

The key point here is that even if all candidates meet the physical level required by category *T4* as an entry requirement, instructors view that test only as proof that the person is eligible to begin the more rigorous phase of selection. The candidates must also complete a high number of additional physical and psychological tasks over the entire ten-day duration of the selection to contribute to a more robust assessment of individual ability. The psychologist group asks candidates questions related to physical factors through surveys that involve imaginary situational and role-playing scenarios, which gives candidates a glimpse into the challenges of SOF missions, but candidates who move to the next stage still have to demonstrate their ability. The selection aims to exert and increase continual physical and psychological pressure on the candidates. These circumstances simulate realistic pressure under live operations so that the candidates' real level of motivation, endurance and will to perform can be measured.

With regard to team activities, all candidates are tested in both leadership and subordinate positions multiple times. Candidates are not allowed to wear the insignia of their ranks (they wear numbers instead), so all candidates are treated in the same way. All tasks, including leadership-related ones, are measured in scenarios that do not necessarily require a high degree of military expertise, to avoid disqualifying those with fewer years of service. To determine signs of willingness and unconventional thinking—based on fictional scenarios—the tasks do not require candidates to have a deep tactical background, but rather a quick, adaptive problem-solving attitude, a positive mindset, the ability to work as part of a team and a high level of endurance.

In sum, the selection process aims to generate and continuously maintain an environment that completely pushes candidates out of their comfort zones, testing their physical and mental abilities through continuous physical and psychological pressure, both at individual and teamwork levels. Officially, a candidate who successfully passes the initial medical examinations, the physical entry criteria, then presented a continuous and convincing physical and mental caliber and passes the individual and team psychological

examinations<sup>97</sup> during the 10 days has successfully completed the selection process, and is eligible to start the Hungarian Special Operations Basic Course (SOBC) later.<sup>98</sup> Upon the selection completion, the 2<sup>nd</sup> SOF Group's commander decides,<sup>99</sup> based on a detailed back-brief and survey sheets documented up by the instructors and input from the psychologist, whether or not the candidate met the conditions that suggest success in the SOF, and who can therefore continue in the SOBC pipeline, or whether a candidate is approved only to try another selection in the future. Under the current regulations, a candidate who decides to voluntarily withdraw, or simply fails any task (not, necessarily, for medical reasons)<sup>100</sup> can try the selection only twice.

### **3. Case Study: HDF's Efforts to Widen 2nd SOF Group's Recruitment Pool—The SOF Camp**

The Special Operations Forces Camp (SOFC), organized in 2018, is a case of a joint successful recruitment endeavor by the HDF and SOF. Among many recruitment driven camps,<sup>101</sup> the SOFC is the only event organized annually by the HDF specifically

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<sup>97</sup> Eleven specific SOF required skills—Quality of task performance, creativity, leadership efficiency, teamwork, adaptive learning, communication skills, task orientation, soul presence and stress tolerance builds up the frame of the competency list—were monitored during all activities. Of these, communication skills, stress tolerance, creativity, leadership efficiency, and teamwork were examined with high priority.

<sup>98</sup> Ibid., 7–8.

<sup>99</sup> Due to continuous cooperation between the USA and the Hungarian Government, a large number of soldiers of the HDF have been able to take part in various training programs in the United States, partly in accordance with the requirements of the 2<sup>nd</sup> SOF Group's selection. In those particular cases, the 2<sup>nd</sup> SOF Group's commander has the authority to decide to accept the course in question to eliciting the selection. Nowadays the following foreign (U.S), and national courses come under consideration: Ranger School, Sapper School, Reconnaissance And Surveillance Leader's Course. The only Hungarian course in particular is the *Rohamlövész tanfolyam*, as the Hungarian Special Combat Infantry School, pendant to the U.S. Army Ranger School.

<sup>100</sup> Measuring entry requirements is simply based primarily on physical and health considerations; if the candidate has the medical approval and can pass the *T4* level physical test level, the candidate can start the selection. The current 2<sup>nd</sup> SOF Group regulations allow candidates to regenerate on medical leave for a maximum of 48 hours on the advice of the medical staff.

<sup>101</sup> Various services, and programs were developed by the apparatus of the MoD and HDF, such as; Military cadet Program, HDF Scholarship System, Military Elementary School Education, National Military-Sports Competition, Higher Education Scholarship Program and the different Military Camp(s). Since 2017 the annually organized SOFCs allowed 106 men and women to participated so far. "Különleges honvédelmi tábor felnőtteknek," July 17, 2019, <https://honvedelem.hu/media/aktualis-videok/kulonleges-honvedelmi-tabor-felnotteknek.html>.

for men and women 18 years or older in age.<sup>102</sup> The event enables participants to gain extensive insight into military life, and more closely into the world of the 2<sup>nd</sup> SOF Group. In 2018, preliminary surveys<sup>103</sup> showed a high level of interest in offering the camp, so two camps were conducted at the same time; one was designated as an advanced SOFC. The main requirement for the targeted group was to have had past experience within the Armed Forces, such as in the HDF or police, or even being a former participant of the previous SOFC which was organized in 2017. This recruiting concept had a dual purpose: to convince the ex-military, or police serviceman, who show increasing interest in re-joining the HDF in recent years, while convincing hesitant participants to sign up for the SOFC again too.

The camp covered all aspects of targeted recruitment, assessment, selection, and training. Eighty percent of the participants ultimately joined the HDF after the camp. To support the updating of the HDF's employer brand, modern equipment was used, and one SOTG was dedicated to presenting and communicating this message in a method designed to reach a wide target audience, as well as investigate segment of society's habits and suspected needs. The SOFCs were implemented in the mold of the 2<sup>nd</sup> SOF Group, involving one Special Operations Task Unit (SOTU) and a limited number of Special Operations Task Group personnel.

This opportunity enabled the advanced SOTG to include an exercise designed around one of the SOF's core tasks, exploiting capabilities in non-conventional operations. The advanced SOFC was conducted in a scenario that integrated all civilians and tasked them with conducting "activities to enable a resistance movement or insurgency to coerce, disrupt or overthrow a government or occupying power by operating through or with an underground, auxiliary and guerrilla force in a denied area."<sup>104</sup> Thus the personnel of the

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<sup>102</sup> In the official advertising campaign, and regarding to the given Hungarian appellation the event was named *Special Forces Military Camp*, but due to the involvement of the 2<sup>nd</sup> SOF Group, here in the following the term SOFC will be used.

<sup>103</sup> The Special Operations Inspectorate along with the HDF *HFKPÜ*—the HDS's office responsible to organize the NDEP military camps—measured the initial responses via facebook and email responses from the previous year participants.

<sup>104</sup> Norbert Tajti, "Enhancing Hungarian Special Forces through Transformation--the Shift to Special Operations Forces," n.d, 126, 18.

assigned SOTU gained the opportunity to practice and also to assess the capability of the participants in a realistic scenario. Additionally, the scenario provided an unexpected benefit; the SOFC enabled the instructors to gain insight into the level of the participant's willingness and capacity to engage as a resistance element in case they were needed for a homeland security situation. Due to the potential deployment of resistance forces from a national defense perspective, the application possibilities of the reserve forces deserve further research.<sup>105</sup> This event was not just a part of the recruitment campaign, but the HDF gained a more detailed view of the capability, dedication, and motivation of potential volunteers.

Promoting the SOFC only on social media in a one-month period resulted in hundreds of people inquiring every year. In 2018, nearly a hundred applicants were directly contacted in the following steps, and due to the limited places, forty<sup>106</sup> of them were selected. The order of registration and the screening of the Military National Security Service (MNSS)<sup>107</sup> and medical suitability played a significant role in the pre-selection process. However, since 2018, places remain limited and inquiry is high; there has been a significant number who have applied and obtained the appropriate approvals, yet on the day of commencement or immediately thereafter, voluntarily withdrew from participation, likely due to waning motivation. In terms of the recruiting potential of this program, and in the light of resource management,<sup>108</sup> the absence of the potential personnel amounts to a loss for the HDF in terms of time and money invested.

There are two main reasons potential participants fail to follow through. First, the candidate does not receive ongoing contact such as through inspirational messages, e.g., through a closed Facebook group, that could consistently stimulate or even boost his/her

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<sup>105</sup> A mandatory confidentiality statement was required from the participants. The results of the interim and final questionnaires also confirmed that, –although in a small number- but not everyone would give up his/her job or existence for the active service, but in a national defense situation like the scenario, resistance activity and its importance would make them join clearly.

<sup>106</sup> The strength of 40 personnel represented both the SOFC basic, and the SOFC advanced in total.

<sup>107</sup> Military National Security Service (MNSS) represents the military branch of the National Security Services.

<sup>108</sup> During the SOFC a significant amount of supply and resources from the blank ammunition to the fuel perspective for aerial assets has been used.

level of excitement and motivation to attend. Second, despite receiving consistent contact, the applicant does not proactively follow the updates over time, so when the day comes to report to camp, the candidate has changed his/her mind.<sup>109</sup> The main tool for communication regarding these SOFCs was e-mail. However, while email ensures continuous communication between the individual and the dedicated organizer,<sup>110</sup> the information flow via email in terms of sequencing and quality is limited.

While email contact has its drawbacks, George F. McGrath provided an important argument for email marketing in his thesis *Email Marketing for the U.S. Army and Special Operations Forces (SOF) Recruiting*: “people prefer to use the internet because it is cost-efficient, saves time, and it is more convenient.”<sup>111</sup> The advanced SOFC proved that a modern, progressive approach to training in line with the expectations of the age group is effective to address and motivate today’s young people. It is also effective to increase the interest and will among civilians to join the reserve forces, and for reserve forces to expand their training programs, which could in turn aid retention. “In addition to acquiring tactical knowledge, basic military values such as discipline, teamwork, camaraderie, national self-awareness can be developed during the program without their direct practice or education.”<sup>112</sup>

During the advanced SOFC, three questionnaires were given to participants. The first one, constructed by the SOTG staff, was given at the beginning of camp, and included general questions measuring the participant’s initial opinion about the HDF. The second one—led by two students of the University of *Eötvös Lóránd*—was given after the first week, and surveyed the participant’s opinions with regard to the SOFC’s atmosphere. The third—a synthetical survey conducted by the SOTG—was given right after the closing

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<sup>109</sup> There is no financial loss for the civilian candidates, as they will have to pay the already extremely low price for the camp on the day of enrollment only.

<sup>110</sup> In the case of the SOFC camps, the *MH HFKPÜ* and the Special Operations Inspectorate were partly designated in terms of contact build-up and pre-organization.

<sup>111</sup> George F McGrath, “Email Marketing for U.S. Army and Special Operations Forces (SOF) Recruiting,” n.d, 94.

<sup>112</sup> *Honvéd Vezérkar, Hadműveleti Csoportfőnökség*, General Staff of the Armed Forces, Official report for internal use, HUN CoS 2017, 3.

ceremony, and sought to measure the participant's willingness to join the HDF, linked to a presentation about the HDF's contracting opportunities.

The maximum number of participants for the advanced SOFC was set at 20. The number of participants decreased to 13 before the camp started, mainly because they changed their minds. Of the 13 candidates who participated, 12 were male, 6 were between the ages of 18 and 24, and 3 were over 40. Interestingly, the 25–29 age group was not represented. The absence of participants in this last group could be explained by the inflexible nature of the workload and the schedule typical of a first-usually-civilian job assignment, which offers fewer holidays, while the 18–24 age group were more likely able to use their holidays during the school's summer break.

The recruitment goal of the exercise was fulfilled, as 10 of the 13 members considered joining the HDF. Two of them planned to join the 2<sup>nd</sup> SOF Group, while 6 were specifically interested in the SOTG, who organized and led the advanced SOFC. The statement of the participants supported by the surveys, and their following inquiries, proved that the close involvement of the 2<sup>nd</sup> SOF Group operators carries an effective recruiting potential.

Beyond the nature of the event, the most determining factor was the credibility of the instructors. The experiences of the SOF trainers gave the real atmosphere of the camp. The procedures and methods described in the regulations and manuals may not be sufficient alone to implement a successful program. So, the didactic foundation has been proven here as well the reality, in addition to “what we teach” at least is important—if not more—is who should teach?<sup>113</sup>

Based on the surveys and additional opinions, clear deficiencies were confirmed. Even if the personal satisfaction of the participants in the advanced SOFC were rated extremely positive, and their willingness to choose a military career was proven to be high, if the HDF is unable to act quickly, potential personnel could be lost due to intense labor market competition. Based on the unanimous opinion of the participants in 2018, the

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<sup>113</sup> *Honvéd Vezérkar, Hadműveleti Csoportfőnökség*, General Staff of the Armed Forces, Closing Report, Official report for internal use, HUN CoS 2017, 3.

quality of the media products did not meet the requirements of the 21<sup>st</sup> century's brand, the textual content often evokes a bygone era, or contains inaccuracies or misapplication of military terminology. Ambrus Péter agrees in the *Generációs kihívások kezelése a Magyar Honvédségben*<sup>114</sup> that the role of the media and Internet sites, in the promotion of the military service and the HDF, to gain social recognition is unquestionable. Significance of the proper employer brand and its advertisement has to be communicated with the necessary intensity and appropriate method. The importance of social media stands out; in 2019, the majority of applicants and the earliest responsive individuals came from a community who had created a Facebook group(s) and Twitter profile for themselves based on the friendships and ties from the previous year.

To sum up, the recruitment media tools and capabilities operated by the MoD and the HDF provide sufficient coverage of the activities of the 2<sup>nd</sup> SOF Group, and the brigade is regularly involved in active recruitment programs, i.e., public and capability demonstrations. As such, even though SOF generally avoids publicity, they still conduct a particular level of public engagement in order to promote the brigade to civilians, but also to the HDF's other elements.

### **C. ANALYSIS OF THE 2<sup>ND</sup> SOF GROUP'S MANNING: PROGRESS AND CHALLENGES**

The 2<sup>nd</sup> SOF Group's manning endeavors have had varying achievements in terms of successful recruitment and retention of capable personnel. Indeed, the current HDF's recruitment strategy has helped the military recruit the right and adequate Hungarians. As the 2<sup>nd</sup> SOF Group assimilates into the HDF's current recruitment system, this strategy has also successfully contributed to maintaining the brigade's professionalism and *vice versa*.<sup>115</sup> The SOFC, in particular, confirms this recruitment synergy between the HDF and the 2<sup>nd</sup> SOF Group. A small number of SOF personnel are able to implement, plan and execute activities—with relatively low financial cost—under high flexibility to achieve the

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<sup>114</sup> LtCol. Péter Ambrus, „Generációs Kihívások Kezelése a Magyar Honvédségben,” Managing Generational Challenges in the Hungarian Defence Forces (*Honvédelmi Szemle* 2020/4), 118.

<sup>115</sup> “Honvédségi Szemle 2009 | Arcanum Digitális Tudománytár.”



HDF's and the 2<sup>nd</sup> SOF Group's simultaneous goals for recruiting. Based on the background, time, and experience spent in other assignments, an external volunteer can bring unique and useful experience redundancy into the brigade. Therefore, for example, a soldier who completes the SOBC, and possesses artillery or engineer background, can increase the capability and knowledge of a SOTU, because SOF—in general—relies also on conventional sustainment and support. Hence, external recruitment remains a priority task for the 2<sup>nd</sup> SOF Group.

Likewise, in the context of the internal 2<sup>nd</sup> SOF Group's recruitment process, the selection results in fewer but higher-quality candidates who pass the required tests and challenges to advance to the SOBC. Indeed, as illustrated by the most current selection process, which occurred between July 22 and July 30 in 2020, of the 34 applicants, 7 completed the 10-day selection and all seven graduated candidates were recommended to begin the Special Operations Basic Course.<sup>116</sup> The seven successful candidates represent a realistic proportion—in terms of the average. However, the preliminary surveys, which functioned as an assessment, highly supported the result. The assessment proved that an individual's motivation, character, family, professional background, goals, and military attitude must be measured before and during the selection. One observation was that the instructors, who led the selection 24/7 and placed the candidates under extreme pressure, must work in a more close coordination with the team of psychologists to gain a complete evaluation of any applicant.<sup>117</sup>

In general, the candidates who successfully completed the selection in the summer of 2020 were strongly motivated to join the 2<sup>nd</sup> SOF Group, as Siklódi concluded in the report. They showed an appropriate level of teamwork capability, and they were characterized by adaptive thinking and task orientation; however, fields of weaknesses

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<sup>116</sup> Viktor Siklódi, „Különleges Műveleti Kiválasztó-Felmérő Foglalkozás” (Special Operations Assessment and Selection (2<sup>nd</sup> SOF Group internal distribution, 12.08.2020, reg. Number 1097/33).

<sup>117</sup> The survey used here to present the motivational drives, and characteristics which led to success or failure was conducted and distributed for official use within the 2<sup>nd</sup> SOF Group by First Lieutenant Viktor Siklódi as the psychologist officer of the brigade's medical branch. Source: Viktor Siklódi, *Különleges Műveleti Kiválasztó-Felmérő Foglalkozás* (Special Operations Assessment and Selection (2<sup>nd</sup> SOF Group internal distribution, 12.08.2020, reg. Number 1097/33).

were also discovered which required improvement. In 2020, the candidates' unanimous impression was that the 2<sup>nd</sup> SOF Group was the top available option within the HDF. The potential of receiving high-end training and access to a variety of foreign armaments and equipment likely played a role in their conclusion. Highlighting the human environment in the 2<sup>nd</sup> SOF Group due to the considerable high expertise of the operators in service was also a crucial motivation to explore. The claim for a positive atmosphere, owing to the work and performance orientation, was described in the overall attitude of the candidates. According to the candidates, the HDF can be considered a stable, reliable employer and workplace. They had a strong desire to prove that they were the most suitable candidates to the 2<sup>nd</sup> SOF Group and also to their family and friends—an important recruitment criterion.

The existence of a stable military attitude by candidates is highly beneficial to the HDF, because it can indicate a long(er) interest in military service. Siklódi conducted the preliminary interview with all 34 candidates,<sup>118</sup> and stated that the majority of them had a so-called *military attitude*.<sup>119</sup> Siklódi urges more research on this topic, because it cannot be explained only with impressions about the military life at a young age or just with the need for excitement and adrenaline. Family traditions, and family members who are or were in military service and who have influenced the candidate directly or indirectly, are also important elements. Further research can ultimately provide the HDF and the 2<sup>nd</sup> SOF Group with a deeper understanding of the psychological connections associated with the so-called military attitude. This knowledge in turn could allow establishing a more efficient and flexible targeted recruitment tradecraft.

Despite this significant manning progress, the 2<sup>nd</sup> SOF Group's internal recruitment process has been plagued by several challenges. To begin, although as compared to the other combat elements of the HDF, the 2<sup>nd</sup> SOF Group offers a more attractive career to its

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<sup>118</sup> Ibid.

<sup>119</sup> This is an unconscious urge to which the candidates could not give an objective explanation. There may be many reasons for a "military attitude," but the attraction to a military lifestyle as something to live for is significantly strong and measurable during the assessment.

personnel—in terms of good salary and generous monthly bonuses<sup>120</sup>—this attractive package does not seem to substantially incentivize RTG soldiers to join the SOTGs in the volume that could reduce the effects of the natural fluctuation. The reason for this unfortunate trend is that RTG soldiers generally do not want to give up their habitual working conditions, community, and friends. The higher monthly salary available in the SOTGs does not always motivate RTG soldiers to leave their current position, which gives them the opportunity to take part in frequent overseas deployments. The six- to seven-month rotations ensure a significantly high salary, and the young, usually less-experienced soldiers, find the option more attractive. The soldiers who have several years of experience within other military branches and show interest in the selection and then the SOF specialty are often hesitant to apply, because of how they might be treated by fellow soldiers and commanders if they fail to make the selection and must return to their unit.<sup>121</sup> In this sense, the way the 2<sup>nd</sup> SOF Group recruits from other military organization requires authorization from the higher command and official coordination.<sup>122</sup>

The brigade's current organizational culture—rooted in the fusion of two distinct battalions—poses an additional challenge to the 2<sup>nd</sup> SOF Group's recruitment process. Both of the former battalions gave up their own identities in part to meet new challenges—in terms of capability development—associated with the newly-created organization. The transition was especially challenging for both organizations involved, due to the fact that they were settled in the same garrison, located in the same base and had always maintained a healthy rivalry. This phenomenon, which can be called unit patriotism, is noticeably

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<sup>120</sup> The static monthly „special operation complements” differs in percentage in the distribution of the base rate, and is bound to the level of the individual's qualification. The highest rate can be given to personnel with SOBC qualification and active position within one of the SOTGs. The lowest can be given to personnel within combat support, or combat service support, even staff positions in the SOTGs.

<sup>121</sup> The RTG soldiers' concerns are based often the myths about the difficult selection, also on the following year of demanding training at the SOBC, with the uncertain chances of graduation. The aftermath based on this organizational phenomenon diverts the RTG soldiers from applying. Based on the authors survey conducted with the RTU soldiers in the summer of 2019, through anonymous questionnaire.

<sup>122</sup> If the soldier's reluctance stems from lack of official information, and the soldier is not aware of the official process of signing up or the nature of the selection, the 2<sup>nd</sup> SOF Group must manage the flow of information. The 2<sup>nd</sup> SOF Group has developed efficient methods to address this option. While in the past (even before 2012) mostly the military organizations were notified of upcoming selections by fax and email, today, the media and 2<sup>nd</sup> SOF Group official visits are increasingly used to improve the success of external recruitment.

present within the brigade, and still divides the 2<sup>nd</sup> SOF Group. The main, and perhaps the only, carrier of this attitude is the individual—the soldier, who views the fusion as a career regression. If this dynamic also exists at the leadership level—whether officers or NCOs as leaders—it creates a toxic environment, which sometimes impedes the optimal individual development cycle, described as the optimal internal recruitment.

Unit patriotism can be seen in a positive light, but like the word fluctuation—used in human resources management—it mostly describes a challenging, negatively charged occurrence. On one hand, patriotism refers to loyalty, faithfulness, and to a strong bond that ties a person and his/her attitude to a community. On the other hand, unit patriotism can generate an internal resistance to any development that might affect habitual conditions, beliefs, even identity. Usually, this resistance manifests in a person in the form of a negative or pessimistic attitude, but resistance could escalate to a larger problem if it affects leadership and the decision making. Regarding the 2<sup>nd</sup> SOF Group, unit patriotism has existed since the two former battalions were merged into a brigade, and even if it is not a dangerous, inhibitory phenomenon, it affects internal manning processes, and, slightly, morale.

Another challenge to the 2<sup>nd</sup> SOF Group's manning stems from the brigade's rigorous selection process—which limits the number of possible operators. Indeed, due to the strenuous recruitment standards, not all candidates are able to complete the selection process, and are therefore forced to drop out. Either the instructors remove him, or these candidates voluntarily withdraw (as they realize that they do not have the physical strength and/or the mental mindset to continue).<sup>123</sup> The rejected or withdrawing candidates pose an additional challenge to the selection process. Sometimes, candidates who cannot meet the training standards attempt to hide their pain (in the case of injury, for example) or weaknesses (in the case of psychological tests) to avoid being perceived as weak by their team members.<sup>124</sup> These candidates ultimately have a deleterious effect on team synergy

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<sup>123</sup> When the candidate suffers an injury, it is the medical team that orders to remove the person from the selection for safety precautions.

<sup>124</sup> According to Siklódi, the 27 candidates who failed to continue the selection process in 2020 manifested these characteristics.

and morale, as their behavior illustrates that they are not cut out for the SOF job, which requires physical and mental adroitness and a talent for teamwork. As such, the relatively high dropout rate reveals that the pre-selection—considered as the conclusion—process is far from perfect.<sup>125</sup> Therefore, the selection and its requirements must be treated highly carefully. All in all, even if the attrition rate negatively affects the 2<sup>nd</sup> SOF Group's ability to fill the SOF operator positions, the standards must be considered as assurance for the successful mission and the operator's life.

#### **D. CONCLUSION**

Since Hungary is not only a NATO member but also the framework nation of the Regional Special Operations Command (R-SOCC),<sup>126</sup> which has to achieve the FOC in 2024, the stakes are high. Hungary's national interests, as well as its commitments in the alliance, have given the 2<sup>nd</sup> SOF Group a significant opportunity to gain military experience in operational theatre and in the field of multinational cooperation. Still, the legacy and future of the special operations capability are largely preserved and carried forward by the 2<sup>nd</sup> SOF Group's operators, so these personnel are key cornerstones for maintaining this extraordinary capability.

The 2<sup>nd</sup> SOF Group has an enormous potential regarding its own targeted recruitment, but at the same time it suffers from significant limitations. In terms of potential, the brigade offers most of the potential any modern employer brand must offer; at once, it carries the presence of modern technical equipment and weaponry, non-conventional operational procedures, and the promise of adventurous life within the service. According to Judit Stummer,<sup>127</sup> the younger generation expects these benefits,

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<sup>125</sup> Even those candidates who pass these tests, and become SOF operators, become extremely stressed during training. Siklódi indicates when the candidates had to fulfill leadership positions anxiety and inadequate behavior occurred often.

<sup>126</sup> Followed by the initial agreements, the Regional Special Operations Component Command will involve four allied partners; Austria, Croatia, Slovakia and Slovenia beside Hungary as the framework nation. The command will reach its full operational capability by 2024.

NATO, "Four Allies and one partner will create a regional Special Forces command," 13 Feb. 2019. [https://www.nato.int/cps/en/natohq/news\\_163360.htm](https://www.nato.int/cps/en/natohq/news_163360.htm)

<sup>127</sup> Judit Stummer, "A Magyar Honvédség személyi állománya utánpótlás biztosításának lehetőségei a köz- és felsőoktatásban tanulók körében," n.d. p. 180.

which dovetails with the HDF's employer portfolio. Fundamentally, the 2<sup>nd</sup> SOF Group—and one of its SF predecessors, the 34<sup>th</sup> SF Battalion—has consistently represented the modern image of the HDF since 2005.

At the same time, the brigade also struggles with challenges. On the one hand, from the external side, the virtual presence and advertising strategies do not meet the trends and level of the quality that attracts civilians from the general population and soldiers within the HDF. On the other hand, its internal recruitment is restrained in the manning cycle, due to the highlighted factor of unit patriotism.

The current HDF recruitment strategy has helped it to recruit Hungarians who can capably fulfill their roles in the military service. As the 2<sup>nd</sup> SOF Group takes on a larger role in the HDF's current recruitment system, it benefits reciprocally in maintaining the brigade's manning and professionalism. The SOFC, in particular, confirms this recruitment synergy between the HDF and the 2<sup>nd</sup> SOF Group. A small number of SOF personnel are able to implement, plan and execute activities—with relatively low financial cost—under high flexibility to achieve the HDF's and the 2<sup>nd</sup> SOF Group's simultaneous goals for recruiting. Therefore, involving the 2<sup>nd</sup> SOF Group in the HDF's planning processes, and allowing its freedom of maneuver by planning and resource management, can ensure that execution and effect will be mutually beneficial.

In sum, a small-state SOF can achieve strategic-level goals. It must be equipped with state-of-the-art tools, but as one of the SOF truths states, "Humans are more important than hardware."<sup>128</sup> Therefore, for the 2<sup>nd</sup> SOF Group, finding the right talent is a key task, and the importance of the human factor cannot be underestimated. The SOAS is the very first, but most vital, decisive point to allow only the right soldiers to progress further on the long path to becoming a SOF operator.

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<sup>128</sup> "USSOCOM," accessed October 24, 2020, <https://www.socom.mil/about/sof-truths>.

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## **IV. SURVEY OF INTERNATIONAL SOF: BACKGROUND AND RESULTS**

Staffing the SOF with adequate number and skilled operators generally involves a four-phase cycle as follows: Recruitment; Assessment; Selection; and Training.<sup>129</sup> This process is known in the U.S. Army as RAST. However, the objectives of this research require a fifth module to be added to RAST, Retention. This thesis's survey aimed to identify similarities and differences among the six participating countries within the five main categories of RAST-R. Therefore, the survey's question categories are based on the U.S. Army's SF pipeline—RAST—but include retention as a measure of effectiveness in terms of human resource management.

This chapter provides an analysis of this cycle involving six countries around the world—NATO and non-NATO members—based on a survey conducted by the author.<sup>130</sup> The findings of these surveys serve as the basis for this thesis's suggestions for improving the 2<sup>nd</sup> SOF Group recruitment process.

### **A. BACKGROUND ON THE SURVEY: SCOPE AND METHODOLOGY**

The survey conducted between August and September 2020 aimed to gain knowledge of RAST-R practices and results from the experience of SOF forces serving in different geostrategic environments, but with a similar strategic purpose and skillset. Although the surveyed countries differ from Hungary—as, for instance, they may face different security challenges and threats—ultimately, SOF recruitment processes and challenges are likely comparable. In this connection, the author surveyed six international military students at the Naval Postgraduate School: three representatives of NATO countries (from the Estonian Special Operations Forces, the Hellenic Special Forces, and the 8<sup>th</sup> U.S. Psychological Operations Group) and three representatives of non-NATO countries (from the Naval Special Operations Command from the Philippines, the Joint

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<sup>129</sup> LTC Manuel A. Diemer, USAWC Strategy Research Project: Manning Special Forces in the 21 Century: Strategies for Recruiting, Assessing, and Selecting Soldiers for Special Forces Training, (U.S. Army War Collage 2001), iii.

<sup>130</sup> The survey questions are included in Appendix A



Special Operations Command from Colombia, and the Special Operation Forces from the Lebanese Army).<sup>131</sup>

The first category, “General Questions” (questions 1–8), focused on general challenges related to manning and exit rate. The two-way closed-ended (*yes/no*) format questions measured whether the respondent’s faced any challenges associated with filling and retaining operator positions within their SOF, and if yes, what corrective actions their SOF organization has undertaken. This category also examined in a two-way closed-ended (*yes/no*) question whether said change in manning and retention requirements have negatively affected the morale of the existing operators, a factor which can lead to an increased exit-rate. Furthermore, this category sought to assess the age and professional/military experience of new volunteers, which could be useful when assessing the volunteer distribution, therefore considering their motivational trends or hierarchy. I assumed that every country follows the philosophy of allowing “only the best qualified”<sup>132</sup> soldiers to join their elite ranks. Therefore, if the number of quality SOF operators after the long RAST process—in this case without the retention perspective—is decreasing, I asked whether the country utilizes changes to adapt with revised actions.

The second category, “On Recruitment” (questions 9–14), aimed to assess how responsible and involved the SOF is in recruitment. The survey sought to examine the incentives to join SOF in the respective country, and the specific recruitment methods used by SOF in each surveyed country to convince individuals to join the SOF.<sup>133</sup>

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<sup>131</sup> Four officers were students in the National Security Affairs Department, and two were students in the Defense Analysis Department.

<sup>132</sup> LTC Manuel A. Diemer, USAWC Strategy Research Project: „Manning Special Forces in the 21 Century: Strategies for Recruiting, Assessing, and Selecting Soldiers for Special Forces Training,” (U.S. Army War Collage 2001), 2

<sup>133</sup> The virtual media plays a crucial role in advertising, the message—as recruiting in this case—can be spread easily and in large scale, but has its limitations also. This category investigates the measure of the effectiveness of the active, or even ex-operators involved in the recruitment. Face to face interactions with SOF operators based on their “credibility, appearance,” and advice to go further: testimonials, I assume can support the SOF operator recruitment effectively. In addition to forming a link between the civil society and the closed community of SOF. This form of communication may be the most effective and credible “myth-destroying” channel. See: Steven M. Swierkowski and Robert M. Burrell, *Tactics, Methods and Techniques to Improve Special Forces in-Service Enlisted Recruiting*, Thesis (NPS 2002), 58; and Craig Michael, *Dispelling Myths About Special Operations Forces*, (War on the Rocks, March 2017)

The third category, “On Assessment and Selection” (questions 15–26), examined personnel assessment and selection procedures, which are the first and most crucial milestones in the process of *making* SOF operators. The objective of the first part, assessment, is to filter out incapable candidates based on the unit’s expectations. The questions related to assessment surveyed how the responding countries focus on the physical and mental capabilities of candidates. The second part, selection, is a critical and essential part of the process, and some countries integrate it into their SOF basic course. The Assessment and Selection category also examined whether the respondent countries use any kind of separated selection phase before the SOF basic course. Selection processes are used to determine the individual’s will and mental and physical stamina, often tested under extremely rigorous conditions to simulate the realistic environment in which SOF operates. “Selection is not about finding the best people, but finding the right people who, like chalkboards, possess the right core competencies to be trainable.”<sup>134</sup> Therefore, the survey’s set of questions sought to identify the similarities that prompt applicants to *quit* the selection. This category also sought to identify if a country experiences a continuous declining trend in the number of volunteers, and whether, due to the ratio of successfully selected candidates vice those who attrite, the countries’ SOF change their standards or methods. There could be the possibility that potential candidates may be able to complete the rigorous training and acquire the knowledge and skills that are needed, which may require a different method and a different gradation of physical and mental pressure during the initial period. The preliminary information<sup>135</sup> revealed that not all countries use a separated phase as a selection to filter suitable personnel prior to their SOF basic training. In this case—without the rigorous selection process—a larger number of candidates will start the SOF basic training, especially if there were no preliminary caveats, such as minimum age, and/or service years, even in specific elements of the country’s armed forces. I assumed that if the training SOF pipeline does not contain a separated selection at

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<sup>134</sup> “Leveraging Ethics in Military Leadership | Deloitte Insights.”

<sup>135</sup> My preliminary assumption is based on multiple unofficial discussion with international SOF during overseas deployments, or Joint Combined Exchange Trainings, or exercises. This *sensitive* topic always formed a debate in terms of breaking the established norms and system (f.e: leaving the selection phase behind), and adapting the follow on SOF basic training to enhance manning options.

the beginning, then the country's SOF basic training, either throughout or during certain key periods, included deliberately specific events that aimed to filter out the potentially suitable recruits from the incompetent—in other words, as an integrated selection phase. On the one hand, SOF basic training should be a significantly challenging period for candidates, merely due to the acquisition of complex theoretical and practical knowledge resulting from the nature of the SOF core activities.<sup>136</sup> On the other hand, if a larger number of young, sometimes inexperienced, applicants start SOF basic training, and the systematically increasing degree of the workload ensures their development, the possibility exists that the number of operators able to complete the pipeline may eventually increase.

Whether during the selection or during the long SOF basic training period, the candidates face a high number of various challenges. The candidates must possess a strong mental endurance and the physical stamina to pass every obstacle. One of the factors leading to candidate failure—noted by Siklódi Viktor<sup>137</sup> and cited in chapter 3—can be the weakness or uncertainty of the candidate's self-confidence. Based on the author's experience, this factor can significantly increase due to the candidate's not knowing the minimum level of requirements during the selection procedure. The fact that candidates must leave their comfort zone and confront their own boundaries, especially their weaknesses, is difficult for many candidates to overcome mentally, so they *quit*. I sought to measure the difference regarding the success ratio—through the answers of the responding countries—based on whether the standards are known or unknown by the candidates.

This third topic also sought to assess post-injury circumstances; specifically, whether—followed by a justified and medically approved expert opinion—it is possible for a candidate to take permission for a certain time; “medical hold.” My experience is that a large number of physical injuries occur during selection procedures. Injuries are not always possible to prevent due to the nature of the tasks during selection; however, safety

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<sup>136</sup> SOF core tasks can be diverse from the countries national interest, however, the core activities listed by the United States Special Operations Command (USSOCOM) covers the wide spectrum in terms of the participating countries in the survey. <https://www.socom.mil/about/core-activities>

<sup>137</sup> Siklódi is the Psychologist officer of the Medical Branch of the 2<sup>nd</sup> SOF Group.

must be a primary goal of the instructors and all facilitators involved. Based on my personal experience, the candidate's *fear* of being injured, and losing their chance of passing the selection, can have a significant appearance in their performance.<sup>138</sup> This occurrence can manifest in the candidate's conscious and intentional modulation of their efforts, even if a selection scenario is designed to measure the individual's instinctive stamina and maximum capability. Therefore, an authentic measurement of performance is more difficult to measure from the instructor's side.

The fourth category, "On Training" (questions 27–32), examined SOF basic training in general, even if these essential training events are country-specific in nature.<sup>139</sup> I assumed that if a particular SOF unit in a country regularly faces declining selection rates, it could either change its own standards or initiate preventive actions to increase the candidate's chances. Therefore, I sought to find whether the surveyed countries use preparative training, such as a pre-training phase to enhance the candidate's skills, before starting the actual SOF basic training. I sought to identify the training phases that have the highest fall-out rate compared to the country's profile. On one hand, during the SOF basic training, the voluntary withdrawals or dismissals by the instructors, and injuries, will occur in high percentage. But on the other hand, during the training phase, the instructors and the SOF unit's leaders are *working* with candidates who more likely to have the natural ability to become SOF operators. Hence, I also examined what kind of policies and routines are in use regarding the "recycle,"<sup>140</sup> or otherwise, whether options are available for the candidates to continue or re-start the SOF basic training later, if an injury, voluntary withdrawal (VW), or other occasions caused them to defer. I tried to find whether there is

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<sup>138</sup> My observations are based on the experience gained when I was a participant during HUN SOAS, and the HUN SOBC and the Special Combat Infantry Course in Hungary. Also when I participated in the U.S. Special Forces Qualification Course, or later led some of the 2<sup>nd</sup> SOF Group's selections in Hungary.

<sup>139</sup> The previously mentioned attributes such as: security threat, economical background, etc, likely shapes the structure of the SOF basic training, and the desired skill of the operators.

<sup>140</sup> John Black, Optimizing Special Forces Selection? Don't bother, we don't want it (SOFREP, Jan 28, 2020)

<https://sofrep.com/news/optimizing-special-forces-selection-dont-bother-we-dont-want-it/> The term recycle can be considered as officially used especially in the U.S. ARSOF. Besides, many countries, such as Hungary adopted the term and is in use officially.

a potential trend between the different SOF *military occupational specialties* (MOS),<sup>141</sup> in terms of popularity that attracts the candidates to become a SOF operator. My experience is that trends regarding the popular MOSs change periodically but are not trend-like evincible. For example, the RTG infantry soldiers often preferred the weapons specialist or engineer specialist MOS more than the communication specialist. The candidate's expectation could be influenced by a common tie, such as friendship, and camaraderie among applicants, as well as a simple fear from a MOS that may be considered more difficult.<sup>142</sup> In most cases, obviously, the choice above the MOS is not the candidate's individual decision. The given demand—in terms of the gaps that have to be filled with new operators—will affect the military organization's needs to determine the type and number of the needed MOSs, which will affect the distribution of candidates during the SOF basic training. The trainees will be designated for their future SOF MOS, thus their specialty and position in the SOTU will be initially decided. This decision can potentially affect an individual's personal goals and thus their further motivation throughout their initial career in SOF.

The fifth category, “On Retention” (questions 33–34), briefly assessed the possible reason for fluctuation and “exit ratio,” regarding personnel retention endeavors. This category sought the results in case of reduced norms and requirements within SOF organizations. Either from coercion due to manning problems or from an incorrect leadership decision, how negatively affected was the operator's morale in the organization? Do the responding countries—at the operator level—experience a growing exit rate due to perceived or real decline in organizational values, such as entry requirements? Also, from the broad aspect, what are the main drivers behind the decisions of the operators who are leaving their SOF?

The five categories of the questionnaire included 34 questions. Of these, 20 were constructed in a two-way closed-ended (*yes/no*) form and 5 questions were created in such

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<sup>141</sup> In terms of the U.S. terminology, the 18 MOS series are in use in SOF. The HDF has its own official terms and codes for the assignment/specialty abbreviations, but they indicate the same occupational specialties, for example the weapon specialist or the intelligence NCO.

<sup>142</sup> This assumption is based often by stereotypical information, f.e: the simplicity of the weapons specialist, and the accentuated difficulty of the medical specialist requirements.

a way as to be answered by placing the given criteria in numeric order. The remaining 9 questions were created in such a way as to allow the participants to express their views in a short text form, but to avoid asking a personal-subjective opinion or an opinion that is predictive in nature point of view.<sup>143</sup>

## **B. SURVEY RESPONSES AND ANALYSIS**

The following assessment presents the results provided by the six responding SOF representatives. To protect the identity of the participants, the assessment and Appendix B will use the two categories NATO SOF and NON-NATO SOF to present the results—the three NATO SOF countries first, and the three NON-NATO SOF countries second.<sup>144</sup> The structure follows the organization of the questionnaire, summarizing the qualitative outcomes and the quantitative information. In many cases, the assessment also includes the respondents' textual answers; therefore, some keywords revealing their identities have been obscured. The main limitation—due to the length of the questionnaire—is the form of the analysis. Instead of a complete report, presenting all the questions and all respondents' individual answers, the results are summarized.

See Appendix A, "Questionnaire," for the questionnaire used to gather participant responses, and Appendix B, "Summary of the Responses," for a summary of participants' responses.

### **1. Assessment of the Responses to the General Questions**

Four of the six participants claimed that within the past 5 to 10 years their SOF unit experienced challenges regarding manning minimum requirements. The two exceptions were represented by the NON-NATO SOF E and the NATO SOF C. To the next question, which examined manning problems in terms of experiencing challenges to fill the positions of SOF operators, in parallel with the growing proportion of exit rate from the SOF unit,

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<sup>143</sup> I took these limitations fully into consideration while establishing the questionnaire, so the respondents represent only, and exclusively the unified and official point of view of their Special Operations Forces element in question.

<sup>144</sup> However, I believe in some points it is highly beneficial to observe the causes and effects in a given country's answer in the flow of RAST-R. In order to present these correlations while preserving security measurements, all respondents are named randomly with alphabetical letters as well.

the results are almost homogenous. Five countries agreed regarding the challenges to filling the empty positions of SOF operators, while the NON-NATO SOF E has not faced such a challenge.

Regarding the reduction of the basic volunteer requirements for entry, only the representative of NATO SOF A answered in the affirmative, explaining with:

...the selection process was re-evaluated and basically restructured. The main reason was not to lower the bar or requirements but to select the people who might or potentially have the SOF required capabilities. The real test actually continues after the selection when the new [candidates] go through Special Operator Basic Course [for the length of] (6-8 months).<sup>145</sup>

Specifically, only the NON-NATO SOF E took steps to lower the standards and requirements from the physical and psychological perspective. The representatives from the other five countries stated that their standards were not modified. However, the NATO SOF A respondent noted that “Although it seems, that the standards (physical) were lowered in [the] selection, the candidates still have to successfully finish the 6–8 months SOBC course where standards are unchanged.”<sup>146</sup> The NATO SOF C representative emphasized his disagreement on the effectiveness of lowered standards to overcome manning issues by noting. “Actually, the quality of personnel increased with more tailored selection and training.”<sup>147</sup> In the case of reduced physical and psychological requirements, and its documented negative effect on the morale within the SOF organization, five countries gave negative answers, while the NON-NATO SOF E answered in the affirmative. Finally, only the NON-NATO SOF F experienced an increased exit-rate between the trained SOF operators; four participants did not. One country—NATO SOF C—did not respond to this question.

The survey confirmed that manning problems pose significant challenges to SOF globally. Two-thirds of the respondents indicated the decreasing number of new volunteers,

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<sup>145</sup> Appendix B, q. 3.

<sup>146</sup> Appendix B, q. 4.

<sup>147</sup> Appendix B, q. 4.

while all respondents agreed that the exit rate from the trained operators is higher than that of the newly integrated operators. Nonetheless, the vast majority retained their standard physical and psychological requirements to join their SOF unit, and maintained their selection standards. The trend that, on average, the generation between the age of 23–27 signs up, with 3–5 years of military experience seeking excitement and challenge, was detected too.

## **2. Assessment of the Answers to the Questions on Recruitment**

Four out of six respondents stated that their country has a specifically SOF-oriented recruitment system. Exceptions were represented here by the NON-NATO SOF E and the NATO SOF C. The NON-NATO SOF D stressed the importance of the contact, and then recommendations through active SOF operators within the organization:

...We recruit only from the services ... based on personal contact between active operators and other branch members in active duty. After getting a list of recommended personnel, we request them to the specific service command, and after approval, they are disposed to participate in our selection course. For the latter, soldiers are recruited only from the Army. We have a SOF recruitment committee that travels to different Army Divisions. Assessing different soldiers' profiles. After a comprehensive evaluation, those selected are allowed to start the SOF selection course.<sup>148</sup>

The NATO SOF C made the following comment: "A recruitment ... has a specified program to promote new recruits to join. The recruitment ... puts up advertisements in regular units, holds recruitment events, conducts face-to-face counseling, and offers monetary incentives to join [the] SOF units."<sup>149</sup>

With regard to the question of whether the SOF of a given country are *deliberately involved* in the planning and implementation part of the recruitment strategy,<sup>150</sup> the NATO SOF B and the NON-NATO SOF E answered with negative, while the other four countries

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<sup>148</sup> Appendix B, q. 9.

<sup>149</sup> Appendix B, q. 9.

<sup>150</sup> Appendix A, q. 10



are *deliberately involved*. In contrast, NON-NATO D emphasized that “The SOF organization provides a recruitment committee to assess and select candidates in different Army units.”<sup>151</sup>

Regarding recruitment methods—based on the feedback from the respondents—personal contact between the active operators and other individuals in active service proved to be the most effective method. In addition, the NON-NATO SOF D listed the official recruitment within the military as the most effective, which here can be interpreted from the SOF side toward conventional forces as part of an established and routine recruitment strategy. Interestingly, the NATO SOF C noted primarily the effectiveness of social media, then the official website, and third, personal contact. In terms of the least effective method, printed media presented a consensus.

In terms of social media presence, only two nations are represented on Facebook, the NATO SOF A and the NATO SOF C. The other four countries are not present on social media. In this context, the NATO SOF A respondent highlighted its effectiveness: “Facebook page has turned out to be very successful. Also, our people (anonymously) will write articles [for] domestic military magazines (very often these articles are cited or referenced to our main news pages or domains).”<sup>152</sup> Only the representatives from the NATO SOF A and NATO SOF C answered yes to the question of whether they have the right to manage and administer their “own” social media portfolio.

The answers seeking to locate the main motivational factors for joining the SOF revealed that the factors of excitement and challenge came in first. The least contributing factor that drives individuals to volunteer to join their SOF was brotherhood, not far ahead of “money..”

The methods of effective recruitment are divided into two main fields: using social media as an necessary shaping effort, and as more importantly, using active SOF members as a face to face promotional method. It can be concluded from the answers that the social media and face-to-face contacts reinforce each other; they do not necessarily exploit the

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<sup>151</sup> Appendix B, q. 10.

<sup>152</sup> Appendix B, q. 12.

desired recruitment result separately. To achieve favorable results in recruitment, the majority of the countries have a SOF-focused recruitment campaign at the DOD/MoD level, and the SOF—at the unit level—is physically involved in the implementation.

### **3. Analysis of the Answers to the Questions on Assessment and Selection**

With regard to the questions related to pre-selection, all respondents indicated that they have a type of pre-emptive screening, and in all cases, both physical and mental abilities are measured. NATO SOF C also highlighted the factor of aptitude measurement.<sup>153</sup> The NATO SOF A respondent mentioned that language skills and prior study qualifications are also additional measurement aspects. All countries utilize a separate phase as selection, except the NON-NATO SOF F.

Regarding the physical requirements, based on the respondents' answers, similar types of physical tests are routine,<sup>154</sup> adjusted to the standards of their armed forces. For example, in the NON-NATO SOF D, 100% is considered the accepted standard level, while in the case of the NATO SOF C, an additional 10% above the regular physical norms is expected from the candidates.

In the case of the question of whether the SOF unit found these standards adequate to test the candidate's initial capacity, while also being *realistically achievable for the candidates*, the NON-NATO SOF D and the NATO SOF C respondents strongly agreed, while the other four countries agreed.

In the case of the classified and released selection standards, the distribution is varying; NATO SOF B, and NATO SOF A and the NATO SOF C are not sharing the information with the candidates. The other three countries are doing so. During the NATO SOF A's selection, only the first physical test requirements are disclosed to the candidates. The NATO SOF B is applying both methods, while in the case of the NATO SOF C, the official physical requirements are disclosed, at the same time the standards of

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<sup>153</sup> NATO SOF C's operational profile consist multiple non-kinetic capabilities, therefore aptitude tests could measure the candidate's skills for example in negotiation techniques.

<sup>154</sup> In terms of aerob and anaerob physical exercises, such as: running, swimming, ruck marching and pull ups, push ups, and different upper and lower body strength exercises.

psychological skills, and the expectations during group tests, are not disclosed to the candidates.

In the case of failing candidates, physical injuries proved to be the most common cause. The cause of failing during the selection was followed by two categories with only a slight difference: physical capabilities and lack of motivation and interest. The respondents had an almost unanimous opinion that the least common reason for failing or quitting during the selection is social integration/fit-in problems.

A possible explanation for the high ratio of failing candidates due to injuries or weak physical strength and motivational endurance may be the answer of the respondents on when, or during which phase of the selection, causes the highest rate of failing candidates. The answers reveal that all countries have a significantly difficult period in their selection, often in the early days, to filter out the majority of the incapable candidates. The NON-NATO SOF E explained that the dropout rate occurs in the highest numbers at the beginning of the selection because participants are facing the challenges of a high level of pressure and expectations. Mental intolerance as a cause is here significantly high, while later during the selection the causes are more related to physical injuries.<sup>155</sup> The high dropout rate is also reflected in the NATO SOF A respondent's opinion that in the first phase, "the people with [the] wrong mindset, and illusions will drop out."<sup>156</sup> The NON-NATO SOF D respondent's assessment confirmed that the first period (s) of selection placed a greater and more intense burden on participants to consciously segregate weaker and/or less determined candidates.

During the selection process, two out of six countries allow the use of fixed-duration medical break (medical hold), represented by the NON-NATO SOF F and the NATO SOF C here. Within the answers, the NON-NATO SOF F stated that the medical hold's duration is tailored to the different phases.<sup>157</sup>

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<sup>155</sup> Appendix B, q. 24.

<sup>156</sup> Appendix B, q. 24.

<sup>157</sup> Appendix B, q. 25.

With regard to the question on changes in policies or strategies in the past 5–10 years to achieve a higher success ratio during the selection, the NON-NATO SOF E mentioned that there have been efforts over the last six years to optimize physical pressure to a certain level to reduce the risk of injuries. The NON-NATO SOF D respondent mentioned their assessment-focused strategy of delegating a team of 3–4 officers, and non-commissioned officers, to the Corporal’s Academy to conduct preliminary surveys.

After a long and comprehensive assessment, candidates that demonstrate to have a SOF profile and voluntarily, are allowed to enter the selection process. However, due to their lack of tactical and technical expertise, these personnel if approve the selection process, will work in SOF support areas such as the Training Battalion or so, while continue to train and develop the required skills to be a SOF operator.<sup>158</sup>

Without exception, all SOF respondents utilize an assessment process to screen and filter out candidates who are physically or mentally unsuitable. This preliminary assessment aligns with the 2<sup>nd</sup> SOF Group; furthermore, the selection’s physical requirements presented strong similarities. However, from the results, two approaches can be linked for improvement regarding the devised selection: first, as NON-NATO SOF D indicated, systematically organized pre-assessments—conducted on scene at the location of other military organizations; second—as highlighted by NON-NATO SOF F—that leadership play a crucial role to manage the changes in the organizational culture. The “traditional”<sup>159</sup> mindset here does not mean keeping the values and standards, but not realizing the urge of adaptation to change habits or strategy.

#### **4. Assessment of the Answers to the Questions on Training**

Two of the six respondents—NATO SOF A and NON-NATO SOF E—indicated that they use a kind of preparation training that seeks to increase the chance for the candidates to complete their selection. The NATO SOF A respondent also linked their unique approach, that could be seen as an innovative recruitment tool: “Starting from this

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<sup>158</sup> Appendix B, q. 26.

<sup>159</sup> Appendix B, q. 26.

year, the SOF has its own dedicated and selected conscripts and also continues to train dedicated SOF supporting units in [a] voluntary national militarized organization--Defense League (somewhat similar to National Guard).”<sup>160</sup>

There was no uniform answer to the question of which phase of SOF basic training causes the most dropouts. However, the answers indicate two significant phases or more activity types, such as the Close Quarter Battle (CQB), due to firearms discipline reasons, and the Small Unit Tactics (SUT), due to the intense physical pressure, and leadership skills. The NATO SOF C respondent highlights also a phase comprising “a series of aptitude tests/training when students fail and get recycled but they rarely quit.”<sup>161</sup> In light of the regulations and established procedures for recycling, the similarity is quite high. In each respondent’s organization, the procedure allows the candidate to retry training from the module/block/phase where he or she gave up.

The NON-NATO SOF D and the NATO SOF A stated that this option can be denied from the candidate if the reason was voluntary-withdrawal or the lack of motivational purpose, even disciplinary misdemeanor.

In the case of the possible most popular MOS, the weapons specialist was marked on three occasions. NATO SOF C did not answer this question, but three respondents (NON-NATO SOF E, NATO SOF B, and NATO SOF A) mentioned the weapons specialist as more popular than other MOSs.

Finally, no significant changes—in terms of training structure and policies—were made based on the feedback of the respondents, with the exception of changes in safety protocols.<sup>162</sup>

SOF basic training is structured according to each country’s desired end state in terms of main capability and mission profile. With one exception—NATO SOF A—none of the respondents changed their training system. The represented SOF re-evaluated and

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<sup>160</sup> Appendix B, q. 27.

<sup>161</sup> Appendix B, q. 29.

<sup>162</sup> Appendix A, q. 32.

restructured the selection criteria, to allow the chance for more candidates with advantageous educational background—for example, an IT technician—to pass. As a consequence of restructured selection, the SOF basic course was adapted to measure the candidate's capacity during a longer period. In sum, all countries consider the candidates who have gone through the selection successfully as having an important value. All countries have their own policies to give—at least—a second chance to candidates to prove their willingness if they failed during the SOF basic course.

## **5. Assessment of the Answers to the Questions on Retention**

All respondents noted that the most common causes regarding the exit rate of the trained and experienced SOF operators were primarily family-driven. Except for the NATO SOF C, this aspect was rated by everyone within the top three ranks. Unfortunately, further and accurate determination of the order became difficult, as not all respondents marked all the criteria in this question. Nevertheless, and based on the existing answers, it can be assumed that the next two reasons—with a slight difference—are the high pace of operational tempo and deployment cycle followed by the local civilian sector's seductive and higher salary.

The least possible explanation could be—although here one person did not respond—the declining vocation/dedication towards the military organization due to the lowered bar or altered requirements.

To the last question, according to any implemented MoD/DOD policies or initiated actions to improve specifically SOF retention, I received affirmative in three cases and negative in the three remaining answers. NATO SOF A has not specifically explained the main features of the strategy, but the NON-NATO SOF D explained with the following: “the MoD in coordination with the services' commanders dedicate a special budget and offer better opportunities for further education and specialized training both abroad and

locally.”<sup>163</sup> Also, the NATO SOF C respondent mentioned the “monetary incentive offers (bonuses) and faster career progression offers”<sup>164</sup> as the part of this approach.

Examining retention is a complex task, because, in some cases, the draining effect of the labor market, the active presence of PSC organizations, and even the salary can generate specific subjective points of view in the given country. However, the majority of respondents indicated the lack of time with the families—from the SOF operator’s point of view. Either the operational tempo or training activities are the causes, both hard to reduce. The need for increased and quality time with families has a significant impact on the exit ratio between the SOF operators. To mitigate the exit rate, two of the three respondents highlighted MoD/DOD-initiated steps to prevent or compensate the loss of trained personnel, the financial benefits, career and special training and educational allowances.

### **C. CONCLUSION**

The survey confirmed that manning problems pose significant challenges to SOF globally. Two-thirds of the respondents indicated the decreasing number of new volunteers, while all respondents agreed that the exit rate from trained operators is higher than the entry rate for the newly integrated operators. Nonetheless, the vast majority retained their standard physical and psychological requirements to join their SOF unit and also retained their selection standards. The trend was that the majority of the volunteers are between the age of 23–27 when signing up, with 3–5 years of military experience. The volunteering individuals are mostly driven by visions of excitement and challenge. The adventurous life in the closed world of the elite warriors proved to be more alluring than other possible motivation factors, especially the salary. The interested personnel’s attendance can be influenced through virtual advertisement, but their decision to join is highly dependent on the credible SOF member’s personal impression. The rising consequences of manning challenges, based on the decreasing number of volunteers and/or the growing number of exit ratio, indicated the magnitude of the targeted recruiting. Hence “to help ensure sufficient numbers of SF soldiers is to target and recruit the kinds of soldiers who are most

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<sup>163</sup> Appendix B, q. 34.

<sup>164</sup> Appendix B, q. 34.

likely to succeed.”<sup>165</sup> The larger pool of volunteers can bring positive results, but only if the focus group of the recruits is based on the determined qualities that the SOF is looking for.

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<sup>165</sup> LTC Manuel A. Diemer, USAWC Strategy Research Project: „Manning Special Forces in the 21 Century: Strategies for Recruiting, Assessing, and Selecting Soldiers for Special Forces Training,” (U.S. Army War Collage 2001), 2



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## **V. ANALYSIS, FINDINGS, RECOMMENDATIONS**

The thesis aspired to illustrate the manning challenges that the 2nd SOF Group faces and to identify optimal corrective solutions. To that end, this thesis first investigated the 2<sup>nd</sup> SOF Group's manning possibilities and procedures, and second conducted a survey of various countries to identify how SOF globally mitigates manning shortfalls, even how counterparts are approaching the problem in an innovative way. The results provided a basis to compare the current Hungarian methods and broader methods in terms of RAST-R (Recruitment, Assessment, Selection, Training, and Retention).

This chapter provides a comparative analysis between the Hungarian 2<sup>nd</sup> SOF Group's and international SOF's RAST-R processes. Finally, the findings obtained in possible improvements will be proposed—in the form of recommendations—for the 2<sup>nd</sup> SOF Group's leadership, officers, NCOs, and enlisted men and women, my fellow comrades and friends.

### **A. COMPARATIVE ANALYSIS AND FINDINGS**

*Recruitment.* The research has confirmed that successful recruitment currently relies on two main methods: addressing the masses through virtual space, and, as the survey has shown, involving capable personnel from SOF forces. As a result of the survey, it can be stated that the use or non-use of social media cannot be explained only in terms of the level of operational security considerations, but more in terms of how effectively the possible pool of recruits could be reached and influenced. In the case of Hungary, for example—although the unambiguous success of social media was only partially confirmed by the survey—the HDF has undergone significant development since 2019, and this advertising approach can be considered a success in Hungary. The quality and frequency of use of media products reflect a high level of professionalism, either on social media or on various news portals. Ironically—albeit in a positive sense—one of my recommendations has become partly irrelevant. The 2<sup>nd</sup> SOF Group appeared on social media—on Facebook—on 11 November 2020, and the number of followers is growing

extremely fast, which could significantly increase the Group's recruitment capacity.<sup>166</sup> From the international respondents' survey answers, the most successful method involving SOF operators both in virtual advertisement and in face-to-face recruitment. The first-hand credible information, even in the form of an article on social media or during a public capability demonstration, proved the need for both methods simultaneously.

Nevertheless, the recruitment aspect of the RAST-R sheds light on reality; professional, but mass-targeted, virtual messages can only be interpreted as a supporting effort. It is possible to keep a military organization in the public consciousness, reflect professionalism and create a promising image as an employer, but virtual media does not necessarily generate increasing numbers of volunteers. The comprehensive research has shown that it is the personal persuasion of active SOF operators or individuals delegated by the SOF that makes the recruitment system more effective. The purposeful involvement of SOF members, however they can be included, can be considered an essential part of targeted recruitment. The respondents' statements in multiple places showed that their SOF are deliberately performing recruiting activities in military institutions where they are more likely to find the right people.

This thesis also found that individual motivations may vary, and the cause of the personal motivation that drives a person to choose the dangerous but exciting lifestyle of SOF may never be detected. Although understanding motivation proved to be a crucial element during the research, the question remains: what motivates a person to decline the opportunities of the average life and its multitude of prosperities in favor of an extraordinary way of living? The comparative survey revealed—including the 2<sup>nd</sup> SOF Group—that motivation trends are highly similar globally: seeking excitement, challenge and adventure proved to be prioritized above money, traditions, and even brotherhood.

This research also found that a recruitment strategy based on financial considerations is insufficient and unsubstantiated as effective. Since 2015, for example, the HDF has increased military salaries by more than 50% as part of a significant force

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<sup>166</sup> "MH 2. Vitéz Bertalan Árpád Különleges Rendeltetésű Dandár | Facebook," accessed November 16, 2020, <https://www.facebook.com/mh2krdd/>.

development program.<sup>167</sup> However, the empirical research and the survey have reinforced that salary is not the decisive motivational factor for joining SOF. Any strategy of an efficient and comprehensive RAST-R campaign based only on ensuring high wages is misconceived. This cannot be a sufficient condition, as this trend can be found across the whole spectrum of the Hungarian job market, and it is highly likely all employers are adapting themselves rapidly to the rising salaries. The reality is more complex in its nature because the current demand for labor in Hungary is much higher than the actual and predicted supply. The civilian labor market—which must be considered as a competitor—constantly competes to acquire and retain valuable and indispensable manpower. In addition, the HDF’s diversified and at the same time specifically hierarchical system needs to meet a wider spectrum of labor potential than most civilian employers, which could be a more attractive incentive for the younger generation due to the modern employer and employee relationship. The applied Hungarian and international literature shaped the view that the current, and future, workforce must be interpreted in a different context by their needs. Generations “Y” and “Z” see the role of a leader or a colleague with differently. Their hierarchy of need has been extended with the tier of the informational environment, and at the same time, they are seeking a faster pace toward self-actualization. However, the reinterpreted Maslow pyramid cannot be considered unique in Hungary. The international SOF community is struggling with problems of similar origin, as was confirmed by the survey included in the research.

*Assessment.* Significant efficiency weights of the targeted recruitment also builds a link to the next step in the RAST-R—the preliminary assessment of applicants prior to selection. This assessment is equally important to allowing qualified and trained personnel to fulfill recruiting tasks including advertising strategies. The survey confirmed that all countries surveyed conduct a pre-screening, where a complex physical and psychological

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<sup>167</sup>The *Zrínyi 2026* (Z2026) Defense and Force Development Program is the most comprehensive action initiated in the last thirty years regarding to defense development. In the framework of which the government set the goal of developing the domestic defense industry as widely as possible, in connection with the comprehensive technical and organizational development of the HDF.

Zrínyi A, “A Zrínyi 2026 program. Korlátozott lehetőségek a magyar védelmi ipar fejlesztésére,” 2026, 18.

assessment aims to filter out unsuitable candidates. The method of assessment is also efficiently used by the 2<sup>nd</sup> SOF Group, but only just before the start of the selection. Some of the responding countries conduct additional preliminary surveys “locally” at another unit’s garrison, which is considered a potential pool of candidates. The locally conducted preliminary assessment’s effectiveness is not only based on the needed screening, but it could also provide first-hand feedback on the motivation of volunteering soldiers to join or refuse to join.

*Selection.* Selection plays a key role in shaping the organizational culture of any SOF. The research demonstrated that only the candidates with the *right* mental and physical abilities will have the opportunity to prove themselves in the next phase, selection. Like the 2<sup>nd</sup> SOF Group, each surveyed country uses a separate selection phase—or, where appropriate, a period integrated into the SOF basic training—during which the suitable soldiers are separated from the incapable ones. Selection is not just about finding the right person, it is about “also molding them into the common culture.”<sup>168</sup> The purpose of selection is not to find the best people, but the right people, “who, like chalkboards, possess the right core competencies to be trainable.”<sup>169</sup> The common characteristic in terms of all surveyed countries is the extreme physical and mental strain and pressure exerted on the candidates during the selection process. Within the NATO SOF community, an often voiced opinion, “the standards for joining are lowered,”<sup>170</sup> had the potential to be proven internationally. However, the research refuted this expression considering all the surveyed countries reported that their standards had not been lowered, considering the requirements of joining and passing the rigorous selection in the surveyed countries and in Hungary. This is also a fact regarding the 2<sup>nd</sup> SOF Group, even though the number of operators passing all obstacles at the end of training shows a declining trend.

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<sup>168</sup> “Leveraging Ethics in Military Leadership | Deloitte Insights.”

<sup>169</sup> Ibid.

<sup>170</sup> “U.S. Army Green Berets Accused From Within Of Lowering Standards, NPR.org, accessed November 16, 2020, <https://www.npr.org/2017/12/15/570810197/u-s-army-green-berets-accused-from-within-of-lowering-standards>.

*Training.* The thesis researched the aspect of the SOF basic course only superficially. Although SOF core activities cover, in most cases, similar tasks, the geostrategic and environmental challenges of a given country may dictate a different end state in terms of the skills of the newly trained operators. At the same time, from the point of view of the manning potential, it can be stated that from the phase of SOF basic training, all countries, as well as the 2<sup>nd</sup> SOF Group, start to prioritize with retention in mind. This leadership attitude is manifested in the policy that soldiers who withdraw from training will be given the opportunity to resume the training modules later. By this time, the participating countries—and the 2<sup>nd</sup> SOF Group as well—have already invested significant time and money in a soldier who has the potential to complete the training. This long investment pays off in the person's self-actualization phase. If the trained SOF operator is able later to professionally fulfill his/her position and return through their service the money, time, and trust invested by the system, then the military organization benefits as well.

*Retention.* The research confirmed that the demand for SOF—and therefore SOF operators—grows, while the number of the potential future recruits declines. The challenge regarding manning strategies highlighted a second concern: experienced SOF operators are exiting SOF at a faster rate than they are being inducted. The last element of the abbreviation RAST-R—Retention—is a long process.<sup>171</sup> This research revealed that the exit rate is high in all countries, in many cases outpacing the induction of newly trained operators. The exit rate poses a significant challenge to any SOF, especially when the main reason is the lack of time spent with the family. In this case, mitigation is difficult if the operational tempo is high, and the manning processes are not able to maintain a healthy fluctuation due to the decreasing number of new volunteers.

To sum up, the research confirmed that the essential elements of RAST-R indicate a coherent system and that the order is not interchangeable. This acronym encompasses the time-consuming and costly process in which a civilian becomes a trained and professional

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<sup>171</sup> Retention covers an interval where the operator is able to perform his duties professionally and, his motivation remains at a level that does not feel to compelled to leave the organization.

SOF operator over a period of years and then performs effective work within the military organization.

In this context, based on Hungary's national defense strategy and its commitments within the alliances, it largely refers to the fact that the 2<sup>nd</sup> SOF Group must have the right number and quality of special operators. In the 21st century, the role of special operations forces has increased, and their capabilities and responsibilities have expanded. To meet complex tasks successfully, the requirements in terms of assessing, selecting and training the Hungarian SOF operators cannot be waived. The vision stays invariable; only the right personnel could be able to learn and implement the necessary and vital SOF skills and complete the assigned tasks, and therefore finding, assessing, and selecting the right talent can ensure the future of the 2<sup>nd</sup> SOF Group. From there, the military organization must make sure that the right talent stays in the right position within the organization. As the first SOF core truth articulates, "The right people, highly trained and working as a team, will accomplish the mission with the equipment available."<sup>172</sup> Indeed, people with the right spirit, mental stamina and physical qualities will be needed even more in the future for the 2<sup>nd</sup> SOF Group. Therefore, understanding the factors and drives which could motivate an individual to dedicate him- or herself to join this elite organization could be a major pillar to success. To that end, this thesis provides four possible innovative manning recommendations for the 2<sup>nd</sup> SOF Group manning.

## **B. RECOMMENDATIONS**

The four hypotheses will be considered in the context of RAST-R to make recommendations for the 2<sup>nd</sup> SOF Group, even with regard to how the brigade could propose its concepts to the higher command to develop manning processes. Of the four hypotheses, three are considered fully proven, while one is still partially acceptable as a feasible solution.

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<sup>172</sup> Ibid., <https://www.socom.mil/about/sof-truths>

1. Improved recruitment and promotion processes, including research-based and targeted recruiting involving the 2<sup>nd</sup> SOF Group, in parallel with robust strategic communications and outreach processes.

The first hypothesis can be considered proven, in the light of the current external recruitment activities of 2<sup>nd</sup> SOF Group. Even though the 2<sup>nd</sup> SOF Group has official methods that allow recruiting externally, the brigade could be more proactive at pinpointing locations where potential volunteers could be found, and how to exploit these opportunities through in-person recruiting. On one hand, a list of prioritized target audiences could assist the brigade to suggest locations and events to the HDF where presence and capability demonstrations can bring real advantage to the 2<sup>nd</sup> Group. Also, this advantage could be exploited through the media products. Even if the recruiting event fails to attract the public enough and does not achieve a profit in terms of new volunteers, the occasion could be still profitable if high-quality media is produced for future use. Even if public advertising has undergone significant improvements in recent years, to maintain an attractive employer brand the expected reactions of the targeted audience should be taken into deliberation. Whether the brigade is promoting a featured capability presentation or a newly integrated technical equipment, the message should be carefully crafted to motivate the person to choose the 2<sup>nd</sup> SOF Group within the HDF.

2. Improved pre-selection procedures organized by the 2<sup>nd</sup> SOF Group, also an adaptive selection and SOBC system.

The second hypothesis can be considered fully substantiated. Although the current assessment procedures ensure that the volunteers deemed unsuitable will not be allowed to start the selection, the assessment opportunities are not deeply exploited. The survey proved, in part, that even the 2<sup>nd</sup> SOF Group could organize the assessment in the location of another military organization. The locally executed assessment could ensure a growing ratio of interest, not only because it could be more accessible for the soldiers, but also because the local approach could encourage the soldiers to attend who hesitated before or were simply not well informed. The offsite assessment method could carry recruiting potential also, because it can provide the credible information exchange between the



operators and inquiring soldiers to dispel the often harmful rumors about the 2<sup>nd</sup> SOF Group and its selection criteria.

With regard to SOBC, I also consider the hypotheses to be acceptable. The ongoing large-scale force development and modernization program is constantly integrating new equipment into the HDF. This transformation affects HDF capabilities from the tactical level to the joint force aspect, where the 2<sup>nd</sup> SOF Group is designated to fulfill a strategic role. First, the SOBC could comply with the changes if the newly integrated equipment could affect the employability of the brigade. In light of the new equipment acquisition, the training techniques and procedures must be aligned if possible. Second, the younger generation is not only more receptive to high-tech equipment but are also more adaptable and are eager to be surrounded by the technology and tools of modern warfare. Therefore, as the SOBC cannot ignore the basic principles of rigorous training required for core activities, it must integrate the available new technological assets into the training topics on an ongoing basis.

### 3. Increased salaries and benefits.

The third hypothesis cannot be completely substantiated based on the research. However, the importance of financial benefits requires should be approached cautiously. The fact that the international survey did not prove salary as the key motivating factor in volunteering for SOF does not mean that the importance of financial benefits should be dismissed, especially in the current Hungarian market. Similar to the recent changes in social media presence, during my time of research another significant change occurred in the financial system of the 2<sup>nd</sup> SOF Group. In addition to the significant salary increases of previous years, an extra salary supplement was approved at the MoD level in September, exclusively for the SOTGs. This reason behind this governmental decision was valid: money is not the highest motivating factor for a young individual to join SOF, but in overall, the HDF must compete with the labor market competition to ensure enough recruits. The extra salary carries an extremely important message because only the soldiers who are SOBC qualified and are assigned in one of the SOTGs can receive it. This financial appreciation is hoped to also help internal recruitment towards RTGs.

4. Improved education and training activities regarding organizational culture development.

The fourth hypothesis can be considered proven as a whole. Developing the current organizational culture poses a complex task for the 2<sup>nd</sup> SOF Group, but the process cannot be simply ordered. The improved working conditions, modernized equipment and the aligned TTPs are only slices of a whole spectrum of what needs to be revised. The real essence of the organizational culture change should appear also within the brigade, and this requires an alteration in the attitude of soldiers, but above all at the leadership level. As a recommendation, I would point out that it is not just the SOF operators who are a vital part of the brigade's capability. Nor could the brigade ignore that the CS and CSS elements must be recruited, trained, and retained in their positions. Without their essential work—often in the background—the 2<sup>nd</sup> SOF Group would not be able to perform its tasks. Therefore, the organizational culture must reflect their appreciation and organizational importance. The organizational culture should drive the constructive attitude within the organization as a common cause when facing challenges, to overcome internal problems.

The unit patriotism between the two former battalions must be placed in a healthy bed. The absence of toxic leadership<sup>173</sup> and the supportive attitude of the members could encourage motivated soldiers to sign up for the SOAS. The inner movement, in terms of sustainable quantity and quality of personnel, could ensure more effective manning of the SOTGs. Therefore, the role of the 2<sup>nd</sup> SOF Group's leadership—in both the SOTGs and the RTGs—is crucial to provide realistic options for the subordinates about a potential achievable career. Leaders must determine a realistic concept of the possible options according to the soldier's ability and motivation, and superiors should support their desire for development. Toxic leadership at all levels of the hierarchy can prevent any individual from performing the position that he or she fulfills with enthusiasm. The positive internal attitude could allow the military organization to achieve and maintain a successful organizational culture. Manning processes would be more fluent, and the right talent would

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<sup>173</sup> <https://www.wearethemighty.com/military-life/7-dos-and-donts-of-surviving-toxic-leadership-in-the-military>

be in the right position. To achieve a more positive attitude requires time and cannot be forced. However, internal communication plays a crucial role in avoiding higher-than-needed competition. Therefore, the different core tasks, operational roles and responsibilities of the RTGs and SOTGs should be emphasized and educated at the tactical level, along with the available career path.

The accelerated digital development nowadays also affects the entire HDF. The largest-scale military technology development program for HDF is currently underway, but it is not just the so-called “hard” side of the developments that HDF and the 2nd SOF Group need to pay special attention to. Emphasizing and focusing on the human factor in the employer profile could be a crucial effort in this technologically developing environment. Lt. Col Pákozdi Márta and Lt. Col Torba Attila in the *A Magyar Honvédség Személyi Állományának Motiváció Hierarchiája* refers to task allocating conference in 2018 by the Commander of Hungarian Defense Forces Joint Forces Command (HDF JFC),<sup>174</sup> that the foresight of the coherence of technical developments parallel the organizational culture and the military personal cannot be underestimated. As part of the *Zrínyi 2026* Defense and Armed Forces Development Program, the acquisition of new technical equipment and devices, which meet the requirements of the age, will also require the transformation of the overall HDF, and therefore in the 2<sup>nd</sup> SOF Group as well. “Building and maintaining an employer-brand in the HDF should be treated as a much more complex process.”<sup>175</sup> The organizational culture, social responsibility, daily routine of the employees, and the work atmosphere must be developed. Improved conditions and outreach toward the public can lead to a more complete picture of the given employer overall. This change should come from a higher individual and organizational interest and motivation to increase work performance and a sense of personnel satisfaction simultaneously. If these factors do not support each other, or the balance is not adequate enough, the chance of individual dissatisfaction or disillusionment can increase, and turn

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<sup>174</sup> Based on the Annual Conference by the Chief of the HDF JFC on the 22<sup>nd</sup> of February in 2018.

<sup>175</sup> LtCol Pákozdi Márta – LtCol Torba Attila, „A Magyar Honvédség Személyi Állományának Motivációhierarchiája,” *Motivation Hierarchy of the Personnel of the Hungarian Defence Forces* (Honvédelmi Szemle 2020/2), 38.

into a main cause of fluctuation. According to Andó Sándor, the Chief Psychologist of the HDF, “one reason for employee fluctuation is that one does what likes, but not in that quality”.<sup>176</sup>

To improve the organizational culture, a final aspect is recommended. The long years of intense involvement in Afghanistan and Iraq resulted in a hard-to-remove eye-shade on the operators. The experience gained in COIN operations highly supported the confidence, tradecraft, and esteem in the operators and supportive members. At the time, the intense involvement in combat-mentoring missions and in TAA role placed the SOTUs in the focus, while the other CS and CSS elements were labeled as less important, mostly by the SOF operators. However, the changed security goals in CEE make it necessary to reconsider the brigade’s current and future profile in terms of employability, and this transformation should appear also at the tactical level. To achieve an effective transformation, communication and purposeful education are needed, not only to reduce the previously mentioned unit patriotism, but also to adapt the self-esteem, value and judgment of the CS and CSS elements within the organization. The current SOTG task-organization could ensure the efficient and mission-focused mindset because the organic CS and CSS elements are working side by side daily. However, to improve effectiveness, leaders—at all levels—must prioritize organizational goals above the individual. The first and most important step in the development of the organizational culture is that the entire 2<sup>nd</sup> SOF Group accepts the fact of the change ahead, and that it will affect all personnel.

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<sup>176</sup> Ibid., 39.

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## APPENDIX A. QUESTIONNAIRE

### GENERAL QUESTIONS

1. Within the past 5 to 10 years, has your SOF unit experienced any challenges to managing the minimum manning requirements due to the decreasing number of civilians, or active duty members who have volunteered to join your unit to become a SOF operator?

Yes		No	
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2. Within the past 5 to 10 years has your SOF unit faced any challenges to filling the positions in your SOF teams with trained SOF operators due to increased exit-rate, as compared to the number of new SOF operators?

Yes		No	
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3. Were the standards lowered in your unit, in terms of the basic volunteer requirements for entry (minimum years of service, age, etc.)? If yes please explain how, or in what ways?

Yes		No	
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4. In terms of psychological and physical standards, has your unit lowered its standards to manage manning problems?

Yes		No	
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5. In case of the lowered physical and mental standards, did your unit documented any changes to morale in your unit?

Yes		No	
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6. If yes, has your unit experienced an increased exit-rate of the trained operators (who have years of experience and deployments)?

Yes		No	
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7. Currently, in terms of age range which group describes best the majority of the new volunteers (even newly recruited ones, or those already in service) willing to join your unit to become a SOF operator? Please mark your answer.

18-22	
23-27	
28 and above	

8. Currently, for those with prior military service, which group represents best the majority of the volunteers willing to join your SOF unit? Please mark your answer.

Maximum 2 years	
3-5 years	
6 or more years	

#### ON RECRUITMENT

9. Do you have a SOF specific/focused recruitment process within your MoD/DOD?  
If yes, what specific elements/steps does this process involve?

Yes		No	
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10. Is your unit, or SOF related element deliberately involved in this process? If yes, how?

Yes		No	
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11. Based on your unit's experience, which of the following methods are the most effective, and the least effective methods to recruit the volunteers? (Rate 1 as the most, and 9/10 as the least effective).

	Official website
	Printed media
	Social media (please name the source(s)/platform(s):
	Recruiting offices
	Involvement in job/carrier fairs
	Personal contact between soldiers and civilians during daily life
	Personal contact between active operators and other branch members in active duty
	Advertising in schools (please describe the type of the school if possible):
	Public capability demonstrations, with dynamic shows, and equipment display
	Other (please describe):

12. Can your SOF unit be followed on social media? If yes, please name the type(s). If not, please explain why not.

Yes		No	
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13. If your unit is active on social media, does your unit has the authority to manage and operate it?

Yes		No	
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14. Has your unit identified any motivational factors (wealth, patriotism, benefits) to drive individuals to volunteer for your SOF unit? (Rank them from the most motivational (1) to the least motivational (6).

	Money
	Excitement and challenge
	Patriotism
	Benefits (healthcare, housing, education, etc)
	Brotherhood
	Other (please describe/name it):

#### ON ASSESSMENT AND SELECTION

15. Does your unit conduct a pre-selection, such as any type of pre-emptive screening to assess the volunteers before starting the actual selection, or training?

Yes		No	
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16. If yes, what skills are examined during the pre-selection? Mark your answer.

	Physical capability
	Psychological characteristic
	Both (physical+psychological)
	Other (please name it):

17. Does your SOF unit organize a separate phase for a selection, or is this process an integrated part of the SOF basic/qualification training?

	Yes, we have a separate selection before the training.
	No, we do not have a separate selection before starting the training, but the candidates have to pass successfully specific events during the course to graduate.

18. What are the current minimum physical standards that volunteers must accomplish to begin your unit's selection process? If your unit has a decisive scope for mental/psychological requirements, please describe it.

19. Has your unit found these standards adequate to test the candidates' initial capacity, while also being realistically achievable for the candidates? Please mark the appropriate category.

Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree



20. If your answer is 3 or below, what could be the cause based on your unit's assessment?

	Requirements are excessively difficult.
	Candidates are unable to meet the minimum requirements.

21. Are the candidates aware of the expected standard requirements during the selection, or they are ordered/briefed to perform their maximum?

	Candidates know the minimum standards during the selection.
	Standards are secret, they have to do their best.

22. Describe your current unit's, or past unit's existing selection process briefly. (Highlight some prioritized events if possible, such as long marches, enhanced sleep deprivation, cognitive tests, individual and team phases, etc).

23. In the case of failing candidates, what were the main reasons your unit has documented for quitting during the selection in the past 5 to 10 years? Please rank the following from 1 to 6.

	Physical capabilities
	Lack of motivation and interest
	Lack of mature and mental capabilities
	Injuries
	Social integration/fit-in problems
	Other (please describe it):

24. Based on your unit's selection process, describe the phase/period that caused the most failure and voluntary withdrawal of candidates?

25. If a candidate is injured during your unit's selection, and the injury does not require hospitalization, can the candidate utilize a fixed duration-time break (medical hold), then continue the selection?

Yes		No	
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26. Has your unit applied, or changed some policies/strategies in your unit's selection procedure in the past 5 to 10 years which caused an increased success ratio? Please describe briefly.

## ON TRAINING

27. Does your unit regularly organize a specific training (focusing on the characteristics of your unit's selection) to increase the chance of the future members to pass the selection? If yes, please describe it briefly.

Yes		No	
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28. How is your unit's SOF basic training constructed by phases, or modules (e.g., land navigation, small unit training, close-quarters battle, Military Occupational Specialty- cross-training, etc)? Please describe briefly.
29. Which of these modules/phases has your unit found to be the most difficult to pass for the candidates, and why? Please name and explain it.
30. What is your unit's policy on recycling, in the case of failed candidates? (repeat the whole training, or continue from the remaining phase at the next course)
31. According to your unit's record, which Military Occupational Specialty or specific national, SOF specialty (e.g., engineer/demolition, weapons specialist, medical specialist) are the most attractive for the candidates? If you can mention only the less attractive, please do so.
32. Has your unit applied, or changed some policies/strategies in your unit's SOF basic training in the past 5 to 10 years which caused an increased success ratio? Please describe briefly.

## ON RETENTION

33. In the case of increasing exit-rate of the operators with years of experience and knowledge, what are their main explanations your unit has documented? Based on your unit's experience, rate the reasons from the most to the least common.

	High <i>optempo</i> causes too often overseas deployments and overstretch to the person
	Local civilian factor ensures higher salary
	He/she needs to spend more time with his/her family.
	Lost his/her dedication, due to lowered bar, or altered requirements.
	Physically not capable to perform in the teams, but refuses to accept staff assignment.
	Private Military Companies are offering higher satisfactory options
	He/she assumes that his/her options for further training/development/education are limited.

34. Does your country's MoD/DOD incorporate some programs -or plans- which prioritize SOF retention? If yes please describe some.

Yes		No	
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## APPENDIX B. SUMMARY OF THE RESPONSES

### GENERAL QUESTIONS

1. Within the past 5 to 10 years, has your SOF unit experienced any challenges to managing the minimum manning requirements due to the decreasing number of civilians, or active duty members who have volunteered to join your unit to become a SOF operator?

Yes	4	No	2
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NATO SOF A: Y  
 NATO SOF B: Y  
 NATO SOF C: N  
 NON-NATO SOF D: Y  
 NON NATO SOF E: N  
 NON NATO SOF F: Y

2. Within the past 5 to 10 years has your SOF unit faced any challenges to filling the positions in your SOF teams with trained SOF operators due to increased exit-rate, as compared to the number of new SOF operators?

Yes	5	No	1
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NATO SOF A: Y  
 NATO SOF B: Y  
 NATO SOF C: Y  
 NON-NATO SOF D: Y  
 NON NATO SOF E: N  
 NON NATO SOF F: Y

3. Were the standards lowered in your unit, in terms of the basic volunteer requirements for entry (minimum years of service, age, etc.)? If yes please explain how, or in what ways?

Yes	1	No	5
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NATO SOF A: Y  
 NATO SOF B: N  
 NATO SOF C: N  
 NON-NATO SOF D: N  
 NON NATO SOF E: N

NON NATO SOF F: N

NATO SOF A: „The selection process was re-evaluated and basically restructured. The main reason was not to lower the bar or requirements but to select the people who might or potentially have the SOF required capabilities. The real test actually continues after the selection when the new people go through Special Operator Basic Course (6-8 months). If the participants fail to successfully go through that course, they will not be accepted to the SOF. One of the main reasons for changing the old system of selecting people was that many very promising (right mindset; already possessed some specific knowledge – IT, technology) candidates got injured in the last phases of selection and thus eliminated from joining later.”

4. In terms of psychological and physical standards, has your unit lowered its standards to manage manning problems?

Yes	1	No	5
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NATO SOF A: Y  
NATO SOF B: N  
NATO SOF C: N  
NON-NATO SOF D: N  
NON NATO SOF E: N  
NON NATO SOF F: N

NATO SOF A: „Although it seems, that the standards (physical) were lowered in the selection, the candidates still have to successfully finish the 6–8 months SOBC course where standards are unchanged.”

NATO SOF C: “Actually, the quality of personnel increased with more tailored selection and training.”

5. In case of the lowered physical and mental standards, did your unit documented any changes to morale in your unit?

Yes	1	No	5
-----	---	----	---

NATO SOF A: N  
NATO SOF B: N  
NATO SOF C: N  
NON-NATO SOF D: N  
NON NATO SOF E: Y  
NON NATO SOF F: N

6. If yes, has your unit experienced an increased exit-rate of the trained operators (who have years of experience and deployments)?

Yes	1	No	4
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NATO SOF A: N  
 NATO SOF B: N  
 NATO SOF C: N/A  
 NON-NATO SOF D: N  
 NON NATO SOF E: N  
 NON NATO SOF F: Y

NON-NATO SOF D: „Our SOF organization has seen an increased exit-rate of trained operators for the last 10 years due to better salary offers coming from abroad such as the United Arab Emirates’ forces that currently have 3 battalions fully composed of former ... SOF operators.”

7. Currently, in terms of age range which group describes best the majority of the new volunteers (even newly recruited ones, or those already in service) willing to join your unit to become a SOF operator? Please mark your answer.

18-22	2
23-27	4
28 and above	0

NATO SOF A: 18-22  
 NATO SOF B: 23-27  
 NATO SOF C: 23-27  
 NON-NATO SOF D: 23-27  
 NON NATO SOF E: 18-22  
 NON NATO SOF F: 23-27

8. Currently, for those with prior military service, which group represents best the majority of the volunteers willing to join your SOF unit? Please mark your answer.

Maximum 2 years	2
3-5 years	3
6 or more years	1

NATO SOF A: maximum 2 years  
 NATO SOF B: 3-5 years  
 NATO SOF C: 3-5 years  
 NON-NATO SOF D: 3-5 years  
 NON NATO SOF E: maximum 2 years

NON NATO SOF F: 6 or more years

#### ON RECRUITMENT

9. Do you have a SOF specific/focused recruitment process within your MoD/DOD?  
If yes, what specific elements/steps does this process involve?

Yes	4	No	2
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NATO SOF A: Y

NATO SOF B: N

NATO SOF C: Y

NON-NATO SOF D: Y

NON NATO SOF E: Y

NON NATO SOF F: N

NON-NATO SOF E: „Anyone wishing to be part of our SOF has to pass a three-month training equivalent to the U.S. Rangers. Civilians who directly apply to our SFO either pass the training and join or go home (They can not be recruited into other branches)”

NATO SOF A: “Voluntary; no criminal background or any other obstacles (contact with foreign services) to be able to receive SECRET level access/certificate; MUST have gone through the conscription service (if civilians); the education level at least highschool (12 classes).”

NON-NATO SOF D: “We recruit officers, non-commissioned officers (NCO), and soldiers (Career or professionals, non-conscripts) with previous battlefield experience only. Thus, we have a recruitment system for officers and NCOs, and a second system for soldiers. For the former, we recruit only from the services ..., based on personal contact between active operators and other branch members in active duty. After getting a list of recommended personnel, we request them to the specific service command and after approval, they are disposed to participate in our selection course. For the latter, soldiers are recruited only from the Army. We have a SOF recruitment committee that travels to different Army Divisions assessing different soldiers’ profiles. After a comprehensive evaluation, those selected are allowed to start the SOF selection course.”

NATO SOF C: “A recruitment ... has a specified program to promote new recruits to join. The recruitment ... puts up advertisements in regular units, holds

*recruitment events, conducts face-to-face counseling, and offers monetary incentives to join SOF units. Once an interested recruit contacts the recruitment ..., they set-up an assessment and selection process. This [process] takes about 2 weeks of physical, psychological, and aptitude assessment to see whether the potential recruit is fit for the job. Once the recruit passes the [process], they go through a training pipeline (average around 9–15 months, depending the length of language training) to become an expert in a given field of job.”*

10. Is your unit, or SOF related element deliberately involved in this process? If yes, how?

Yes	4	No	2
-----	---	----	---

NATO SOF A: Y  
 NATO SOF B: N  
 NATO SOF C: Y  
 NON-NATO SOF D: Y  
 NON NATO SOF E: N  
 NON NATO SOF F: Y

*NATO SOF A: „SOF related people are talking to the people interested in joining SOF (going through the Selection) before they enter the Selection process. The results of interviews will be given to the instructors of Selection that will already affect the person (with questionable values the person has to show extra value to successfully negotiate the course (the person himself does not know that of course.)). Also, before the Selection actually starts, all the candidates’ background is investigated in Internal Security Service (domestic version of FBI) and the results will be analyzed and discussed internally in SOF board whether or not to allow the person to take part in Selection.”*

*NON-NATO SOF D: “The SOF organization provides a recruitment committee to assess and select candidates in different Army units.”*

*NATO SOF C: “The recruitment “...” is part of SOF”*



11. Based on your unit's experience, which of the following methods are the most effective, and the least effective methods to recruit the volunteers? (Rate 1 as the most, and 9/10 as the least effective).

„E”	„F”	„A”	„D”	„B”	„C”	
7	5	9	7	-	2	Official website
8	6	7	8	-	8	Printed media
5	7	3	9	-	5	Social media (please name the source(s)/platform(s):
9	2	6	4	-	4	Recruiting offices
3	8	5	6	-	6	Involvement in job/carrier fairs
1	3	2	7	-	7	Personal contact between soldiers and civilians during daily life
2	1	1	2	1	3	Personal contact between active operators and other branch members in active duty
6	9	8	3	-	9	Advertising in schools (please describe the type of the school if possible):
4	4	4	5	-	10	Public capability demonstrations, with dynamic shows, and equipment display
			1 <sup>177</sup>	-	1 <sup>178</sup>	Other (please describe):

12. Can your SOF unit be followed on social media? If yes, please name the type(s). If not, please explain why not.

Yes	2	No	4
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NATO SOF A: Y (Facebook)  
 NATO SOF B: N  
 NATO SOF C: Y (Facebook)  
 NON-NATO SOF D: N  
 NON NATO SOF E: N  
 NON NATO SOF F: N

NON-NATO SOF E: „Our Army (by army I include the navy and airforce as they fall under the command of the army) is very tight when it comes to publicly speaking about actions performed. We have a general website for all the army and a new phone application to communicate with the people in general. Every unit is not allowed to have its own social media connections.”

NATO SOF A: “Facebook page has turned out to be very successful. Also, our people (anonymously) will write articles to domestic military magazines (very often these articles are cited or referenced to our main news pages or domains).”

<sup>177</sup> “Recruitment within the regular army.”

<sup>178</sup> “Personal interest, media exposure.”

13. If your unit is active on social media, does your unit has the authority to manage and operate it?

Yes	2	No	2
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NATO SOF A: Y  
 NATO SOF B: N  
 NATO SOF C: Y  
 NON-NATO SOF D: N/A  
 NON NATO SOF E: N/A  
 NON NATO SOF F: N

14. Has your unit identified any motivational factors (wealth, patriotism, benefits) to drive individuals to volunteer for your SOF unit? (Rank them from the most motivational (1) to the least motivational (6)).

„E”	„F”	„A”	„D”	„B”	„C”	
3	1	5	4	N/A	6	Money
1	2	1	1	2	1	Excitement and challenge
2	3	4	2	1	3	Patriotism
5	4	3 <sup>179</sup>	3	N/A	5	Benefits (healthcare, housing, education, etc)
4	5	2	5	3	4	Brotherhood
			6 <sup>180</sup>		2 <sup>181</sup>	Other (please describe/name it):

#### ON ASSESSMENT AND SELECTION

15. Does your unit conduct a pre-selection, such as any type of pre-emptive screening to assess the volunteers before starting the actual selection, or training?

Yes	6	No	0
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NATO SOF A: Y  
 NATO SOF B: Y  
 NATO SOF C: Y  
 NON-NATO SOF D: Y  
 NON NATO SOF E: Y  
 NON NATO SOF F: Y

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<sup>179</sup> “Education, healthcare”

<sup>180</sup> “Opportunities to train abroad”

<sup>181</sup> “Career in the military”

16. If yes, what skills are examined during the pre-selection? Mark your answer.

„E”	„F”	„A”	„D”	„B”	„C”	
						Physical capability
		X <sup>182</sup>				Psychological characteristic
X	X		X <sup>183</sup>	X	X	Both (physical+psychological)
					X <sup>184</sup>	Other (please name it):

17. Does your SOF unit organize a separate phase for a selection, or is this process an integrated part of the SOF basic/qualification training?

„E”	„F”	„A”	„D”	„B”	„C”	
X		X	X	X	X	Yes, we have a separate selection before the training.
	X					No, we do not have a separate selection before starting the training, but the candidates have to pass successfully specific events during the course to graduate.

18. What are the current minimum physical standards that volunteers must accomplish to begin your unit's selection process? If your unit has a decisive scope for mental/psychological requirements, please describe it.

NON-NATO SOF E: *“Volunteers are subjected to a PT test. Push ups, sit-ups, pull ups, running, and rope climbing. The test is a go/no go. Once the volunteers succeed, they have a medical examination. Only after that, they are allowed to enter the three-month training. Only graduates join the unit. Perhaps now, the standards are changing to meet the U.S. change in the selection process.”*

NON-NATO SOF F: *“They must pass the land and water screening test (2-mile run, 2 min pushups, 2 min situps, pull-ups) and 1-mile swim. They must also pass the NP test from the nearest naval hospital.”*

NATO SOF A: *„Minimum physical requirement is the necessary points in NATO physical test (I don't remember exactly what were the minimum points). The pre-Selection mental part will be covered in short interviews with candidates. These*

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<sup>182</sup> “Any specific knowledge, language, education...”

<sup>183</sup> “Ethical aspect is measured too.”

<sup>184</sup> “Aptitude.”

*will be given to instructors of Selection. The candidates will go through several more mental/psychological and physical tests during the Selection. All successful participants after the Selection with their results in the Selection will go through separate meetings with the SOF board, where all the instructors together with SOF leadership discuss the details of the candidate performance, to decide whether he will be allowed to join the SOBC. If one of the instructors votes NO or has a negative opinion and he is able to justify the reason, the applicant will be denied.”*

*NON-NATO SOF D: “The physical standards for candidates who wish to start the selection process are regulated by the Army’s physical training tables. The standards are directly related to the age of every person and the candidate must pass it with no less than 100%. As an example, to get a 100 % in his qualifications, a male 18–23 years-old must do: 60 push-ups in 1 minute, 65 sit-ups in 1 minute, run 2,400 meters (1.5 miles) in no more than 09:30, and 10 pull-ups.”*

*NATO SOF B:       “a.   Running   3000m   ->   less   than   14min.  
b.   1m run – 100 pull ups – 200 pushups- 300 squats – 1m run -> less than 40min*

*c.       Push ups more than 80 – rest 4min – sit ups more than 80 – rest 4min – pull ups more than 15 – rest 4min – climbing rope 6m without legs GO/NoGO – rest 4min – Run 3,2 km less than 16min.*

*d.       March 24km with 30kgr rucksack -> less than 4h15min.*

*e.       Combat swim 1nm ->less than 55min.”*

*NATO SOF C: “Volunteer need to score about 10% higher in the physical standard that of the regular units. We do IQ test, aptitude test, and psychological test to verify the trainability, potential, and aptitude of the person.”*

19. Has your unit found these standards adequate to test the candidates’ initial capacity, while also being realistically achievable for the candidates? Please mark the appropriate category.

Country	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
„F”		X			
„A”		X			
„D”	X				
„B”		X			
„E”		X			
„C”	X				

20. If your answer is 3 or below, what could be the cause based on your unit's assessment?

-	Requirements are excessively difficult.
-	Candidates are unable to meet the minimum requirements.

21. Are the candidates aware of the expected standard requirements during the selection, or they are ordered/briefed to perform their maximum?

„E”	„F”	„A”	„D”	„B”	„C”	
X	X		X	X	X	Candidates know the minimum standards during the selection.
		X		X	X	Standards are secret, they have to do their best.

NATO SOF A: *„The candidates know only the first, initial NATO physical test points requirement. Also that their background is checked (that they cannot have a criminal background).”*

NATO SOF B: *„Both of these”*

NATO SOF C: *„Both. Some testing, such as Army physical test is open for all to know, they will need to score the minimum requirements. But others, such as psychological, IQ, aptitude, teamwork, etc are not known to the recruits when they go through the selection process.”*

22. Describe your current unit's, or past unit's existing selection process briefly. (Highlight some prioritized events if possible, such as long marches, enhanced sleep deprivation, cognitive tests, individual and team phases, etc).

NON-NATO SOF E: *„The initial selection is based on passing the mental, physical, and medical tests. Once in the three-month training, each month has a theme. First month is the individual phase, the second is the team phase, and last is the patrol phase. If you fail after passing certain phases, you are allowed only once to continue from that phase in one later training. If you fail again, you repeat from the whole beginning.”*

NON-NATO SOF F: *“Almost the same process with the „...” The difference between our „...” week is that we don't allow our candidates to sleep for 6 days.”*

NATO SOF A: *„The candidates will go through basically two main phases in Selection. Individual and Team phases. In the individual phase their physical, mental, stress level, uniqueness capabilities are tested constantly. In the Team phase the candidate’s leader skills, participation will and ability to sacrifice for the team is tested and evaluated.”*

NON NATO SOF D: *„Our initial selection process is composed of three different combat courses conducted by the Army’s training center: Airborne, “...” (Similar to the Ranger course in the U.S. but more adapted to our environment and warfare), and Special Forces. In order to get approval, the candidate must approve all three courses successfully. The “...” and Special Forces courses are the most demanding both physically and psychologically. They include a great number of long runs, long marches with heavy weights, and constant pressure from instructors. Sleep deprivation is always present, especially in the first weeks of both courses. Another significant part of the training is the laboratory for resistance, evasion, and escape. For officers and NCOs, planning and conduction of units play a big role in their final assessment. After approving these three courses, the candidate is now part of the special forces organization and is allowed to enter a two-month special training conducted by the Special Operations Training Battalion in which personnel learns the basic SOF skills.”*

NATO SOF B: “a. long marches

b. enhanced sleep deprivation

c. cognitive tests

d. psychometrically tests

e. SERE”

NATO SOF C: *„Recruits conduct physical test on the first day of the 2 week long selection process. They conduct ruck marches without specified distances. They also do a lot of team challenges where instructors assess each individual’s ability to work in teams. They do nightly essay writing on general issues to check their ability to write and communicate properly. They do group discussion and debates on a given theme to assess their ability to world in teams, social interactions, ability to make sound judgements, and verbal communication abilities. Military tactical trainings such as weapons, unit maneuver, and team problem solving are also part of the assessment week.”*

23. In the case of failing candidates, what were the main reasons your unit has documented for quitting during the selection in the past 5 to 10 years? Please rank the following from 1 to 6.

„E”	„F”	„A”	„D”	„B”	„C”	
1	3	3	2	3	1	Physical capabilities
3	2	½	3	1	4	Lack of motivation and interest
4	4	4	4	2	5	Lack of mature and mental capabilities
2	1	½	1	4	2	Injuries
5	5	5	5	5	3	Social integration/fit-in problems
-	-	-	-	-	-	Other (please describe it):

24. Based on your unit’s selection process, describe the phase/period that caused the most failure and voluntary withdrawal of candidates?

NON-NATO SOF E: *„The start of the process. Talking about how demanding the training is one thing, but experiencing it is another; most quitters report that they did not expect this hard training and/or their bodies could not handle it. Near the end, few withdraw and it is mostly injuries.*

NON NATO SOF F: *“Motivation Phase – Conditioning and physical training (hell week)”*

NATO SOF A: *„The first 3 days when it is not even difficult yet (the people with the wrong mindset and illusions will drop out). The last phase – injuries (this is the reason, why people with possible right mindset mainly dropped out and the Selection was restructured).”*

NON-NATO SOF D: *„Candidates often fail during the Airborne course due to injuries while jumping, or fear of heights. In the remaining two courses, candidates usually fail in the first weeks of lancero and SOF course since these are the weeks in which they are under more pressure both physically and psychologically (sleep deprivation usually comes to 2 hours per day during the first 3–4 weeks of every course).”*

NATO SOF C: *“Physical injuries due to excessive training.”*

25. If a candidate is injured during your unit's selection, and the injury does not require hospitalization, can the candidate utilize a fixed duration-time break (medical hold), then continue the selection?

Yes	2	No	4
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NATO SOF A: N  
 NATO SOF B: N  
 NATO SOF C: Y  
 NON-NATO SOF D: N  
 NON NATO SOF E: N  
 NON NATO SOF F: Y

NON-NATO F: *„But only for 72 hours during normal phase. During ... week, I remember only 4 hours. If they exceed they are dropped from training.”*

26. Has your unit applied, or changed some policies/strategies in your unit's selection procedure in the past 5 to 10 years which caused an increased success ratio? Please describe briefly.

NON-NATO SOF E: *„The trainers were very hard on the process and most of the graduates experienced body injuries at a certain point of their career. For that, the recruitment process was studied and was more systemized in the last 6 or so years to reach a point where the graduates are physically able but at the same time not permanently injured in the process.”*

NON-NATO F: *“None, culture is still traditional. I was the director of the school for 7 months before coming here to NPS. My time is not enough to make changes and its because the culture of instructors and leadership was still traditional.”*

NATO SOF A: *„Answer 3.”*

NON-NATO SOF D: *„Yes, we are working on a new model in which a committee of 3–4 officers and NCOs are assessing candidates directly from the Corporals' academy. After a long and comprehensive assessment, candidates that demonstrate to have a SOF profile and voluntarily, are allowed to enter the selection process. However, due to their lack of tactical and technical expertise, these personnel if approve the selection process, will work in SOF support areas such as the Training Battalion or so, while continue to train and develop the required skills to be a SOF operator.”*



## ON TRAINING

27. Does your unit regularly organize a specific training (focusing on the characteristics of your unit's selection) to increase the chance of the future members to pass the selection? If yes, please describe it briefly.

Yes	2	No	4
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NATO SOF A: Y  
NATO SOF B: N  
NATO SOF C: N  
NON-NATO SOF D: N  
NON NATO SOF E: Y  
NON NATO SOF F: N

NATO SOF A: „Starting from this year, the SOF has its own dedicated and selected conscripts and also continues to train dedicated SOF supporting units in voluntary national militarized organization – “...” (somewhat similar to National Guard).”

28. How is your unit's SOF basic training constructed by phases, or modules (e.g., land navigation, small unit training, close-quarters battle, Military Occupational Specialty- cross-training, etc)? Please describe briefly.

NON-NATO SOF E: “The initial selection is based on passing the mental, physical, and medical tests. Once in the three-month training, each month has a theme. First month is individual phase, second is the team phase, and last is the patrol phase. If you fail after passing certain phases, you are allowed only once to continue from that phase in one later training. If you fail again, you repeat from the whole beginning.”

NON-NATO SOF F: “Motivation phase, Hydrorecon phase, Diving Phase, Demolition phase, “...” tactics phase, Airborne phase.”

NATO SOF A: “Exactly as you provided the example - land navigation, small unit training, close quarters battle, Military Occupational Specialty- cross training.”

NON-NATO SOF D „First two weeks, the course will focus on individual skills, such as physical training, specialists (weapons, comms, medics. Etc.), and lectures of land navigation. The next phase they will work at a squad level on exercises of land navigation, shooting all types of weapons and all environments including close combat, survivability, and insertion/extraction methods (rappel, fast rope, helocast,

*SPIES). Finally, the group will conduct several patrol exercises making emphasis on infiltration and actions on the objective.”*

*NATO SOF B: “The selection phase and then by modules.”*

*NATO SOF C: “ORIENTATION – PHASE 1 (2 Weeks)>SPECIAL OPERATIONS LANGUAGE TRAINING – PHASE 2 (25 Weeks)>SPECIALIST/OFFICER COURSE – PHASE 3 (6 Weeks)>REGIONAL ANALYSIS – PHASE 4 (4 Weeks)>INTERAGENCY TRAINING – PHASE 5 (4 Weeks)>GRADUATION (1 Week).”*

29. Which of these modules/phases has your unit found to be the most difficult to pass for the candidates, and why? Please name and explain it.

*NON-NATO SOF E: “Each phase has its demands and obstacles. Mostly, the individual phase because of the lack of team encouragement and brotherhood. In addition, during this phase, the unprepared volunteers have body failures or injuries that throws them out of the training.”*

*NATO SOF A: “Maybe Small Unit Training, because the demands are high and the training phase quite long. The candidates’ leader skills, endurance and uniqueness are put on real test there.”*

*NON-NATO SOF D: “At this point of training, we have seen a reduction in the personnel failing the process due to the high standards applied in the first selection process. However, the ones who failed usually do it due to lack of technical skills, especially in close combat (shooting), or because an injury which is the most often cause of failing at this point of selection.”*

*NATO SOF B: “Comms -> technical issues, CQB -> failed to follow the rules”*

*NATO SOF C: „SPECIALIST/OFFICER COURSE – PHASE 3 (6 Weeks), because it involves a series of aptitude test/training where students fail and get recycled but they rarely quit.”*

30. What is your unit’s policy on recycling, in the case of failed candidates? (repeat the whole training, or continue from the remaining phase at the next course)

*NON-NATO SOF E: „At the next course, the volunteer starts from the beginning of the phase that he failed. If he fails again (in that phase or any later one before finishing the whole training), he is back to point Zero. From there, any future training starts from the whole beginning.”*

NON-NATO SOF F: *„They go back one phase when they rejoin the succeeding class.”*

NATO SOF A: *„The candidate’s reason for failing is discussed in SOF board and when it’s not motivational the candidate is usually given one more chance in the next course (starting from where he failed). If its motivational or second failure, the candidate will be wished good luck in his future other adventures.”*

NON-NATO SOF D: *„If the reason for failing was medical, the candidates have the chance to resume their process only on every previously completed phase. If a phase was not previously completed, then the candidate needs to start over that specific phase and complete the remaining ones.”*

NATO SOF B: *“Re-test the module and if he fails is OUT, he has to do the whole stuff from the beginning.”*

NATO SOF C: *„Recycle only the portion that the student has failed. However, if the candidate fails for the second time, he/she will be denied further training, effectively terminating the candidacy and sent back to their regular/originating unit.”*

31. According to your unit’s record, which Military Occupational Specialty or specific national SOF specialty (e.g., engineer/demolition, weapons specialist, medical specialist) are the most attractive for the candidates? If you can mention only the less attractive, please do so.

NON-NATO SOF E: *“Most of the candidates want to fight and shoot. For that they mostly avoid medical specialist positions. We assign them to do that training, and probably not the best in the unit take this job although it is a very important job”*

NON-NATO SOF F: *“... operator.”*

NATO SOF A: *“No 1 is usually the weapons specialist. Recently also comms (to my surprise) has been pretty popular. There really has not been least attractive, as much as I have seen or heard.”*

NON-NATO SOF D: *“Medics is the most attractive specialty for candidates and engineers/demolitions are the least.”*

NATO SOF B: *“Weapons specialist, than jumps specialist.”*

NATO SOF C: *“N/A”*

32. Has your unit applied, or changed some policies/strategies in your unit's SOF basic training in the past 5 to 10 years which caused an increased success ratio? Please describe briefly.

NON-NATO SOF E: „I believe not. The training is still the same but with newer methods.”

NON-NATO SOF F: “Yes, got rid of Hell blast and all hands are available during exercises especially at night to prevent accidental deaths.”

NATO SOF A: „Yes, but I think it's classified.”

NON NATO SOF D: N/A.

NATO SOF B: „No.”

NATO SOF C: „No.”

#### ON RETENTION

33. In the case of increasing exit-rate of the operators with years of experience and knowledge, what are their main explanations your unit has documented? Based on your unit's experience, rate the reasons from the most to the least common.

„E”	„F”	„A”	„D”	„B”	„C”	
-	7	6	2	-	2	High <i>optempo</i> causes too often overseas deployments and overstretch to the person
5	1	2	3	-	6	Local civilian factor ensures higher salary
3	2	1	4	2	1	He/she needs to spend more time with his/her family.
6	3	7	7	3	-	Lost his/her dedication, due to lowered bar, or altered requirements.
1	4	5	6	1	4	Physically not capable to perform in the teams, but refuses to accept staff assignment.
4	6	4	1	-	5	Private Military Companies are offering higher satisfactory options
4	5	3	5	4	3	He/she assumes that his/her options for further training/development/education are limited.

34. Does your country's MoD/DOD incorporate some programs -or plans- which prioritize SOF retention? If yes please describe some.

Yes	3	No	3
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NATO SOF A: Y

NATO SOF B: N

NATO SOF C: Y

NON-NATO SOF D: Y

NON NATO SOF E: N

NON NATO SOF F: N

NATO SOF A: *„The SOF has the vital task in our domestic military strategy against .... Elimination of SOF would mean the restructuring of military strategy.”*

NON-NATO SOF D: *„The MoD in coordination with the services' commanders dedicate a special budget and offer better opportunities for further education and specialized training both abroad and locally.”*

NATO SOF C: *„Monetary incentive offers (bonuses) and faster career progression offers.”*

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